HUMANITARIAN ACADEMY · HUMANITAIRES JOBS

Mini MBA Project Management and AI: PMP, PRINCE2, Agile and PMD Pro applied to humanitarian work

Complete manual

A programme of exactly 3 months (12 weeks, 144 hours) to manage humanitarian projects with the main methodologies and artificial intelligence: project cycle, PMBOK and PMP, PRINCE2, Agile (Scrum, Kanban) and hybrid approaches, Project DPro (PMD Pro), logical framework, theory of change and results-based management, planning and critical path, donor budget and earned value, risks and stakeholders, MEAL, donor reporting, change management, leadership and closure. At every step, AI (Claude, Gemini, Copilot and project management tools) is used methodically, protecting the data of the people we serve. Corrected numerical exercises, three monthly exams with case studies, and a verifiable diploma from the Humanitarian Academy. Independent preparation programme: it does not award the PMP, PRINCE2 or PMD Pro certifications, which are obtained through the official exams.

https://humanitairejobs.org/en/academy/mini-mba-gestion-projet-ia/

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Contents

1. Week 1 : The humanitarian project, its cycle and the landscape of methodologies
2. Week 2 : PMBOK and PMP: principles, performance domains and exam preparation
3. Week 3 : PRINCE2: principles, practices, processes and roles applied to humanitarian work
4. Week 4 : Agile, Scrum, Kanban and hybrid approaches in humanitarian work
5. Week 5 : Designing the project: Project DPro, theory of change, logical framework and results-based management
6. Week 6 : Planning: scope, work breakdown, estimating and critical path
7. Week 7 : Budget, cost monitoring and earned value
8. Week 8 : Risks, stakeholders, responsibilities and procurement
9. Week 9 : Steering with MEAL: indicators, monitoring, dashboards and AI
10. Week 10 : Donor reporting, change management and communication
11. Week 11 : Leading the team, ensuring quality, working with partners and closing
12. Week 12 : AI for projects across the organisation: tools, governance and certification paths

Week 1 : The humanitarian project, its cycle and the landscape of methodologies

Objectives

- Define a project, a programme and a portfolio, and distinguish a humanitarian project from ongoing operations.
- Describe the humanitarian project cycle and compare it with the cycles of PMBOK, PRINCE2, Agile and Project DPro (PMD Pro).
- Choose an approach (predictive, adaptive or hybrid) according to uncertainty, the donor and the context.

Project, programme, portfolio

A **project** is a **temporary** endeavour undertaken to create a unique result: building 40 water points, delivering cash transfers to 3,000 households for six months, opening a mobile clinic. It has a start, an end, a budget, a team and defined objectives.

A **programme** groups several related projects to obtain benefits that no single project would deliver: for example a food security programme combining a cash project, an agricultural project and a nutrition project. A **portfolio** is all the projects and programmes of an organisation or country office, managed to achieve the strategy.

Operations, by contrast, are continuous: payroll, fleet management, warehouse upkeep. Many failures come from a confusion: a project that turns into an endless operation, with no clear budget or owner.

> This programme is independent. PMI, PMP, CAPM and PMBOK are marks of the Project Management Institute; PRINCE2 is a mark of PeopleCert; Project DPro and PMD Pro belong to PM4NGOs. The Mini MBA prepares for and introduces these methods; it does not award their certifications.

The humanitarian project cycle

Most humanitarian organisations follow a cycle of five or six stages, inspired by the European Commission's project cycle management:

1. **Identification**: needs assessment, context and actor analysis, decision to intervene.
2. **Design**: problem analysis, theory of change, logical framework, budget, proposal to the donor.
3. **Start-up and detailed planning**: contract, recruitment, work plan, MEAL plan, procurement plan.
4. **Implementation and monitoring**: activities, indicator tracking, risk and change management.

5. **Evaluation**: mid-term or final, using the OECD DAC criteria.
6. **Closure**: final report, financial closure, handover, lessons learned.

The cycle is not linear: monitoring feeds adjustments, and the lessons of one project feed the design of the next. In an acute emergency, stages overlap: we distribute before having a perfect logframe, and regularise afterwards.

Landscape of methodologies

Project management methods do not compete; they answer different needs:

- **PMBOK and PMP** (Project Management Institute, United States): a body of knowledge, principles and performance domains, widely used worldwide; the PMP certification is the best known in the private sector and many agencies.
- **PRINCE2** (PeopleCert, United Kingdom): a method structured by principles, practices and processes, with clear roles and control points; common in the UK, Europe and government-funded projects.
- **Agile** (Scrum, Kanban): adaptive approaches in short cycles, born in software and useful when the solution is not known in advance.
- **Project DPro (formerly PMD Pro)** (PM4NGOs): a guide and certification designed for the development and humanitarian sector, integrating the logframe, MEAL and donor requirements.
- **Logical framework and results-based management (RBM)**: the design and accountability tools required by most donors (European Union, UN agencies, bilateral cooperation).

An effective humanitarian project manager borrows from each: the budget and contract rigour of predictive methods, PRINCE2's continued justification, Agile's short cycles for what is uncertain, and the results language donors expect.

Predictive, adaptive or hybrid?

The approach is chosen by asking two questions: **is the solution known?** and **are requirements likely to change?**

- **Predictive** (or "waterfall"): when the deliverable is well defined and stable. Example: building a school from approved plans.
- **Adaptive** (agile): when we learn as we go. Example: designing a feedback and complaints mechanism with the community, or a data collection application.
- **Hybrid**: the most frequent case in humanitarian work. The contract, budget and logframe are fixed with the donor (predictive), but implementation arrangements are adjusted in short cycles to the context (adaptive).

Adaptive management is now encouraged by several donors, provided decisions are documented: why we change, on what data, with what approval.

Where AI helps in the project cycle, and where it must not decide

Generative AI (Claude, Gemini, Copilot, and the AI features built into project management tools) can help at every stage:

- **Identification**: summarising public needs assessments, structuring a context analysis from your documents.
- **Design**: proposing a problem tree, a first draft logframe, critiquing the coherence of a proposal.
- **Planning**: breaking down the work, proposing a schedule, spotting forgotten dependencies.
- **Monitoring**: preparing dashboards, summarising minutes, analysing anonymised qualitative feedback.
- **Reporting and closure**: first drafts of reports, synthesis of lessons learned.

Three rules apply throughout the programme: **never enter personal data about beneficiaries** into a tool not approved by your organisation; **check every figure** produced by AI; **keep the decision human** for anything affecting people (targeting, selection, security, recruitment).

> AI prepares, the project manager checks and decides. You remain responsible for everything you sign and send to the donor.

The role of the humanitarian project manager

The project manager is responsible for delivering the agreed results **within scope, schedule, budget and quality**, while protecting people. In humanitarian work, add:

- **accountability to affected populations** (Core Humanitarian Standard, CHS);
- **compliance with donor rules** (eligibility of expenditure, procurement, visibility, reporting);
- the **security** of staff and partners;
- **coordination** with clusters, authorities and other actors.

PMI also describes expected skills along three axes: **ways of working** (project management techniques), **power skills** (leadership, negotiation, communication) and **business acumen** (strategy, environment, value). The new exams give growing weight to the third axis.

Exercise: choosing the approach for three projects

Situation. The country office of the fictitious NGO Amana must launch three projects: A) rehabilitate 12 boreholes from validated technical plans, budget USD 360,000 over 10 months; B) design with three communities a feedback and complaints mechanism adapted to women and older people, budget USD 45,000; C) a 6-month emergency cash programme whose transfer value depends on changes in market prices.

Task. 1) Which approach for each project? 2) For A, what is the average monthly budget? 3) Which task can be given to AI in each, and which must it be denied?

Answer. 1) A: predictive (known, stable deliverable). B: adaptive (learning with communities in short cycles). C: hybrid (fixed contractual frame, transfer value revised according to market monitoring). 2) 360,000 ÷ 10 = USD 36,000 per month on average (actual spending will follow the works schedule). 3) A: AI can propose the work breakdown and the schedule; it does not validate the engineers' technical choices. B: AI can synthesise anonymised feedback; it does not choose channels without consultation. C: AI can help analyse public price series; it does not select beneficiary households.

Key takeaways

- A project is temporary and unique; a programme groups related projects; a portfolio serves the strategy.
- The humanitarian project cycle runs from identification to closure, with continuous monitoring and lessons learned.
- PMBOK/PMP, PRINCE2, Agile, Project DPro and the logframe are complementary.
- The hybrid approach is the most common: predictive contractual frame, adaptive implementation.
- AI prepares, people check and decide; no personal beneficiary data in a non-approved tool.

Quiz

1. A project differs from an operation because it is:
   A. More expensive
   B. Temporary and produces a unique result
   C. Always donor-funded
   D. Managed by headquarters

2. Which framework was designed specifically for the development and humanitarian sector?
   A. PRINCE2
   B. Scrum
   C. Project DPro (PMD Pro)
   D. PMBOK

3. To co-design a complaints mechanism with communities, the most suitable approach is:
   A. Adaptive, in short cycles
   B. Strictly predictive
   C. No method
   D. The donor's only

4. Most donor-funded humanitarian projects are managed in a way that is:
   A. Purely agile
   B. Without a schedule
   C. Purely predictive
   D. Hybrid

5. Which task must never be delegated to AI?
   A. Proposing a report outline
   B. Summarising minutes
   C. Selecting beneficiary households
   D. Spotting dependencies in a schedule

Quiz answers : 1. B · 2. C · 3. A · 4. D · 5. C

Week 2 : PMBOK and PMP: principles, performance domains and exam preparation

Objectives

- Explain the structure of the PMBOK Guide (7th and 8th editions): principles, performance domains, processes and process groups.
- Apply the key PMBOK tools to a humanitarian project: charter, project management plan, baselines, integrated change control.
- Prepare a path towards the PMP or CAPM: requirements, exam content and revision method, with AI as a practice partner.

PMI, the PMBOK and the certifications

The **Project Management Institute (PMI)** is a professional association founded in 1969 in the United States. It publishes the **PMBOK Guide** (*A Guide to the Project Management Body of Knowledge*) and the associated standard, and runs several certifications, including:

- **CAPM** (*Certified Associate in Project Management*): entry level, no experience required, with 23 hours of project management education;
- **PMP** (*Project Management Professional*): the reference certification, requiring experience leading projects and 35 hours of education;
- **PMI-ACP** (agile), **PgMP** (programmes), **PMI-RMP** (risk), among others.

Requirements, fees and rules change: in 2026, PMI introduced a new PMP exam (July 2026) and announced additional requirements on where training comes from. **Always check the current requirements on pmi.org** before registering. The hours of this Mini MBA are not automatically recognised by PMI: the Academy is not an Authorized Training Partner (ATP).

From PMBOK 6 to PMBOK 8: what changed

For a long time (up to the 6th edition, 2017), the PMBOK was organised into **5 process groups** (initiating, planning, executing, monitoring and controlling, closing), **10 knowledge areas** (integration, scope, schedule, cost, quality, resources, communications, risk, procurement, stakeholders) and **49 processes**. Many textbooks and organisations still use this vocabulary.

The **7th edition** (2021) replaced processes with **12 principles** and **8 performance domains** (stakeholders, team, development approach and life cycle, planning, project work, delivery, measurement, uncertainty), to cover agile and hybrid work too.

The **8th edition** (late 2025) brings the two together: **6 principles** (adopt a holistic view, focus on value, embed quality, lead accountably, integrate sustainability, build an empowered culture), **7 performance domains** (governance, scope, schedule, finance, stakeholders, resources, risk), and the return of about **40 non-prescriptive processes** organised into five

groups (initiating, planning, executing, monitoring and controlling, closing). It adds guidance on AI, project management offices (PMOs) and procurement.

> For the exam, revise with the current official documentation: the Examination Content Outline takes precedence over any edition of the guide.

The founding tools: charter, plan, baselines

Whatever the vocabulary, three tools structure a PMBOK-style project:

- **The project charter**: a short document that authorises the project and names the project manager. It contains the objective, justification, main deliverables, milestones, overall budget, major risks, key stakeholders and success criteria. In humanitarian work, the approved concept note or the donor contract often plays this role, but a one-page internal charter clarifies responsibilities.
- **The project management plan**: it describes how the project will be planned, executed, monitored and closed (scope, schedule, cost, quality, resource, communications, risk, procurement and stakeholder engagement plans).
- **The baselines**: approved scope, schedule and cost, used as the reference to measure variances. A baseline is changed only after a formal change decision.

Integrated change control links everything: every change request (new site, new activity, delay) is analysed for its impact on scope, time, cost, quality and risk, then approved or rejected by the competent body, and finally logged.

The PMP exam: content and strategy

The PMP exam has about **180 questions in 230 to 240 minutes**, with multiple-choice, multiple-response, matching and graphic questions. It covers three domains: **People** (leadership, team, conflict, stakeholders), **Process** (planning, budget, schedule, risk, quality, procurement, change) and **Business Environment** (compliance, value, organisational change, governance). Since July 2026, this last domain weighs much more than before, and around half of the questions or more concern agile or hybrid approaches. AI, automation and sustainability feature in it.

An effective preparation strategy (8 to 12 weeks):

1. Read the official exam content and the current guide;
2. Complete 35 hours of training that meet PMI's rules;
3. Take full mock exams in real conditions, regularly aiming for 75% or more before sitting the exam;
4. Analyse every mistake: why the right answer best fits the "PMI mindset" (serve the team, analyse before acting, follow the change process, address the root cause).

AI as a revision partner

An AI assistant is a good **tutor**, provided you frame it:

- "Explain the difference between a contingency reserve and a management reserve, with a humanitarian project example."
- "Ask me 10 PMP-style questions on stakeholder management, one at a time, wait for my answer, then correct and explain."
- "Here is my answer and the official answer key: explain why mine is weaker according to PMI."

Limits: AI may confuse PMBOK editions, invent process numbers or get eligibility rules wrong. Never consult it for registration requirements or fees: go to the PMI website. Never buy "real exam questions": this breaches the PMI code of ethics and can lead to the certification being revoked.

Applying the PMBOK to a humanitarian project

Example. Project to rehabilitate 8 health centres, 18 months, EUR 1.2 million. The project manager writes a one-page charter validated by the country director; builds the work breakdown structure (week 6), a schedule with donor milestones and a budget by activity; sets the baselines; keeps a risk register (week 8) and a change log.

Six months later, the ministry asks for a ninth centre to be added. The project manager says neither yes nor no: they assess the impact (estimated cost EUR 140,000, three more months), propose options (reallocate savings, request an extension, or decline), submit the request to the steering committee and then to the donor, and update the baselines only after written approval. This is exactly the behaviour expected in the PMP exam.

Exercise: charter and change request

Situation. WASH project of the fictitious NGO Tawasul: base budget USD 800,000, 15 months, 20 villages. In month 7, the cluster asks to add 4 villages. The observed average cost is USD 38,000 per village. The project has a contingency reserve of 5% of the base budget, already 40% used.

Task. 1) Estimated cost of the 4 villages? 2) Amount remaining in the contingency reserve? 3) Can the extension be funded from the reserve? 4) What process should be followed?

Answer. 1) 4 × 38,000 = USD 152,000. 2) Reserve = 5% × 800,000 = USD 40,000; 40% used = 16,000; USD 24,000 remains. 3) No: the contingency reserve covers identified risks within the approved scope, not new scope, and it is insufficient anyway. 4) Write a costed change request (cost, time, resources, risks), submit it to the steering committee, propose to the donor a contract amendment or additional funding, and update the baselines only after written agreement.

Key takeaways

- PMI publishes the PMBOK Guide and runs the PMP and CAPM certifications; always check the rules on pmi.org.
- The 8th edition of the PMBOK combines 6 principles, 7 performance domains and about 40 non-prescriptive processes.
- Charter, management plan and baselines structure a project; any change goes through a formal decision.
- The PMP exam covers people, process and business environment, with a lot of agile and hybrid content.
- AI is a good tutor, never a source for eligibility rules; no purchased "real questions".

Quiz

1. The document that formally authorises a project and names the project manager is:
   A. The risk register
   B. The communications plan
   C. The project charter
   D. The final report

2. A baseline can be changed:
   A. After a formal change decision
   B. Every week by the project manager
   C. Never
   D. By any team member

3. The 6th edition of the PMBOK Guide had:
   A. 7 principles and 7 practices
   B. 3 accountabilities and 5 events
   C. 12 principles and 8 domains
   D. 5 process groups and 10 knowledge areas

4. A contingency reserve is used to fund:
   A. New scope requested by the cluster
   B. Responses to identified risks within the approved scope
   C. Team bonuses
   D. Headquarters costs

5. To find out the PMP registration requirements, the right source is:
   A. An AI assistant
   B. A forum
   C. The official PMI website
   D. A certified colleague

Quiz answers : 1. C · 2. A · 3. D · 4. B · 5. C

Week 3 : PRINCE2: principles, practices, processes and roles applied to humanitarian work

Objectives

- Explain the five integrated elements of PRINCE2 7: principles, people, practices, processes and project context.
- Use continued business justification, management by stages and management by exception in a donor-funded project.
- Tailor PRINCE2 to an NGO (roles, documents, tolerances) and position the Foundation and Practitioner certifications.

Origin and logic of PRINCE2

PRINCE2 (*PRojects IN Controlled Environments*) is a method born in the UK public sector, now owned by **PeopleCert** (which acquired AXELOS). The 7th edition dates from 2023.

Where the PMBOK describes *what you need to know*, PRINCE2 describes *how to organise and control* a project: who decides what, when, on the basis of which documents. Public donors appreciate it because it makes governance readable.

PRINCE2 7 rests on **five integrated elements**: **principles**, **people** (new in the 7th edition: leadership, culture, change management), **practices**, **processes** and the **project context**, which requires the method to be tailored.

The 7 principles

1. **Ensure continued business justification**: the project must remain justified (benefits, costs, risks) from start to finish. If conflict makes the area inaccessible for a long time, the justification is reviewed instead of continuing out of inertia.
2. **Learn from experience**: lessons are sought at the start, recorded along the way and passed on at closure.
3. **Define roles, responsibilities and relationships**: who represents the interests of the organisation, the users and the suppliers.
4. **Manage by stages**: the project is divided into management stages, with a formal decision at the end of each.
5. **Manage by exception**: **tolerances** are set (time, cost, scope, quality, benefits, risk); as long as you stay within them, the lower level decides; beyond them, it escalates.
6. **Focus on products**: deliverables and their quality criteria are defined precisely before activities are planned.
7. **Tailor to suit the project**: the method adjusts to size, risk and context; a small NGO does not produce 30 documents.

The 7 practices and the 7 processes

The **practices** (called "themes" before 2023) are aspects managed continuously: **business case**, **organizing**, **plans**, **quality**, **risk**, **issues** (which includes change management) and **progress**.

The **processes** describe the flow:

- **Starting up a project**: check that the project is viable and worth launching;
- **Directing a project**: project board decisions throughout;
- **Initiating a project**: project plan, detailed business case, strategies;
- **Controlling a stage**: the project manager's day-to-day work;
- **Managing product delivery**: the team managers' work;
- **Managing a stage boundary**: review and plan of the next stage;
- **Closing a project**: acceptance, evaluation, lessons.

The roles: the project board

The **project board** brings together three interests:

- the **executive**, solely accountable, guardian of the justification: in an NGO, often the country director or programme director;
- the **senior user**, who represents those who will use the results: in humanitarian work, make sure the voice of affected populations is carried, for example through community feedback and local partners;
- the **senior supplier**, who represents those who produce: head of the technical department, construction company, implementing partner.

Below the board: the **project manager**, **team managers**, **project assurance** (independent oversight, for example the quality or MEAL team) and **project support**. One person may hold several roles in a small organisation, except executive and project manager, which must remain separate.

Tailoring PRINCE2 to an NGO and using AI

A realistic tailoring for a project of EUR 300,000 to 2 million:

- a **project initiation document** of 10 to 15 pages (business case, organisation, plan, tolerances, quality approach, risks, communication);
- **stages** aligned with funding tranches or the donor's interim reports;
- simple **tolerances**: for example ±10% on each main budget line and ±3 weeks on milestones;
- a monthly one-page **highlight report**, and an **exception report** as soon as a tolerance is forecast to be exceeded.

AI helps produce these documents from your notes: "From these minutes, write a one-page PRINCE2 highlight report: progress, variances against tolerances, risks and issues, next actions.

Do not invent any figure." It can also play the executive and ask the hard questions before the board. It replaces neither the project manager's analysis nor the board's decision.

PRINCE2 certifications

Certifications are awarded by **PeopleCert** after an official exam:

- **PRINCE2 Foundation**: knowledge of the method, multiple-choice exam, no prerequisites;
- **PRINCE2 Practitioner**: application to a scenario, after the Foundation (or certain other recognised certifications);
- **PRINCE2 Agile**: combines PRINCE2 governance with agile practices.

Formats, durations, pass marks and renewal rules change: check them on the official website before registering. This Mini MBA gives you the basics and case practice; the certification is obtained only through the official exam.

Exercise: tolerances and management by exception

Situation. Stage 2 of a food security project of the fictitious NGO Nahda: stage budget EUR 220,000, cost tolerance ±8%, time tolerance ±2 weeks. Halfway through the stage, the project manager forecasts a final stage cost of EUR 241,000, due to higher seed prices, and a 10-day delay.

Task. 1) What are the limits of the cost tolerance? 2) Does the forecast exceed the tolerances? 3) What must the project manager do?

Answer. 1) 8% × 220,000 = EUR 17,600; tolerance from 202,400 to 237,600 EUR. 2) Cost: yes, 241,000 > 237,600 (forecast overrun of EUR 3,400 beyond tolerance, i.e. +9.5% on the stage budget). Time: no, 10 days remain within ±2 weeks. 3) They must write an **exception report** to the board without delay: cause, impact, options (reduce quantities, change supplier, reallocate, ask the donor for a budget increase), recommendation. The board may request an **exception plan** to replace the stage plan.

Key takeaways

- PRINCE2 7 rests on 5 integrated elements: principles, people, practices, processes and context.
- The 7 principles, including continued justification, management by stages and by exception, are mandatory.
- The project board brings together the executive, the senior user and the senior supplier.
- Tolerances determine who decides; a forecast overrun triggers an exception report.
- PRINCE2 is tailored: an NGO keeps a few short documents, aligned with the donor's stages.

Quiz

1. Who is solely accountable for a PRINCE2 project?
   A. The project manager
   B. The executive
   C. The senior supplier
   D. Project assurance

2. Which element was added as an integrated element in PRINCE2 7?
   A. People
   B. The critical path
   C. The sprint
   D. Earned value

3. Management by exception relies on:
   A. No reports
   B. Daily meetings
   C. Tolerances set for each level
   D. Donor approval for every expense

4. Stage budget EUR 100,000, tolerance ±5%. A forecast of EUR 104,000:
   A. Requires an exception report
   B. Exceeds the tolerance
   C. Requires stopping the project
   D. Stays within tolerance

5. In PRINCE2 7, the "Issues" practice includes:
   A. Change management
   B. Payroll
   C. External communication
   D. Final evaluation

Quiz answers : 1. B · 2. A · 3. C · 4. D · 5. A

Week 4 : Agile, Scrum, Kanban and hybrid approaches in humanitarian work

Objectives

- Explain the values and principles of the Agile Manifesto, and the roles, events and artefacts of Scrum (2020 Scrum Guide).
- Manage a workflow with Kanban: board, work-in-progress limits, lead time.
- Build a hybrid approach that is credible to a donor, and use AI to prepare the backlog and retrospectives.

The Agile Manifesto

In 2001, seventeen software practitioners published the **Manifesto for Agile Software Development**. Its four values:

- **individuals and interactions** over processes and tools;
- **working solutions** over comprehensive documentation;
- **customer collaboration** over contract negotiation;
- **responding to change** over following a plan.

The items on the right still have value; those on the left have more. In humanitarian work, the "customer" is first the affected population: agility meets the requirement for accountability and adaptation to context. But it does not exempt you from the documentation required by the donor, nor from respecting the contract.

Scrum: roles, events, artefacts

According to the **Scrum Guide** (2020 edition, by Ken Schwaber and Jeff Sutherland), Scrum is a lightweight framework based on empiricism (transparency, inspection, adaptation).

Three accountabilities in the Scrum team (10 people at most): the **Product Owner** maximises value and orders the backlog; the **Scrum Master** helps the team apply Scrum and removes impediments; the **developers** (in the broad sense: those who produce) create the increment.

Five events: the **sprint** (one month at most, often two weeks), which contains **sprint planning**, the **daily scrum** (15 minutes), the **sprint review** and the **retrospective**.

Three artefacts with their commitments: the **product backlog** (product goal), the **sprint backlog** (sprint goal), the **increment** (definition of done).

Humanitarian example. An information management team develops a dashboard to track distributions. Two-week sprints; at each review, field coordinators test the version and request adjustments. After six sprints, the tool is in use; with frozen specifications, it would have been delivered late and poorly suited.

Kanban: visualise and limit work in progress

Kanban sets neither roles nor sprints. It asks you to:

- **visualise** the flow on a board (for example: To do, In preparation, In validation, Done);
- **limit work in progress** (WIP) in each column, to finish before starting;
- **measure the flow**: lead time (time between the start and end of an item), throughput (items finished per week);
- **improve continuously**.

Kanban suits support teams (procurement, HR, grants) that receive requests continuously. **Little's law** links the three measures: average lead time = average work in progress ÷ average throughput. If a procurement team has 30 requests in progress and handles 10 per week, the average lead time is 3 weeks; bringing work in progress down to 15 brings it to 1.5 weeks, without working more.

Agile measures: velocity and burndown

In Scrum, the team often estimates items in **points** (relative size) and measures its **velocity**: points completed per sprint. Velocity is used to forecast, never to compare or judge teams.

The **burndown chart** shows remaining work over time. If the remaining backlog is 120 points and average velocity is 24 points, about 5 sprints are needed.

Watch out for drift: inflating estimates to "improve" velocity, or declaring "done" what does not meet the definition of done. In humanitarian work, the definition of done must include protection requirements: for example "tested with users, no personal data visible, translated into working languages".

Hybrid in front of the donor

A donor funds results within a fixed frame. You can still be agile **inside** that frame:

- the **logframe**, overall budget and contractual milestones remain fixed;
- **activities** and arrangements are planned in cycles of 4 to 8 weeks, reviewed with monitoring data and community feedback;
- each adjustment is **documented** (decision, data, approval) and, if it exceeds contractual thresholds (often 10 to 20% reallocation between lines), submitted to the donor.

Structured frameworks exist to combine the two: **PRINCE2 Agile**, the hybrid section of the PMBOK, or scaling frameworks such as SAFe, better suited to large digital organisations than to NGOs.

Common agile certifications: **PSM** (Scrum.org), **CSM** (Scrum Alliance), **PMI-ACP** (PMI). Their requirements change: check them on the official websites.

AI serving an agile team

Useful and safe uses:

- turning expressed needs into **user stories** ("As a site coordinator, I want to see the week's distributions by village, so that I can spot delays") with **acceptance criteria**;
- proposing how to **split** an item that is too big into items deliverable in one sprint;
- synthesising the notes of a **retrospective** into themes and actions, without names;
- preparing a **review summary** for the donor.

AI must not estimate in place of the team (estimation is a collective act that reveals disagreements), nor order the backlog in place of the Product Owner. And community feedback being analysed must be anonymised before it is entered.

Exercise: forecasting with velocity and Little's law

Situation. The information management team of the fictitious NGO Basira is developing a complaints tracking application. Remaining backlog: 168 points. Velocities of the last four two-week sprints: 18, 22, 20, 24 points. Separately, the grants team, run with Kanban, has 24 files in progress and finishes 6 per week.

Task. 1) Average velocity? 2) How many sprints and weeks to finish the backlog? 3) Average lead time of a grant file? 4) What would you propose to reduce it?

Answer. 1) (18 + 22 + 20 + 24) ÷ 4 = 21 points. 2) 168 ÷ 21 = 8 sprints, i.e. 16 weeks (a forecast, to be revised every sprint). 3) Little's law: 24 ÷ 6 = 4 weeks. 4) Limit work in progress (for example 12 files at most): at equal throughput, lead time falls to 2 weeks; finish before starting, and find the column where files pile up.

Key takeaways

- The Agile Manifesto values people, working solutions, collaboration and adaptation.
- Scrum: 3 accountabilities, 5 events, 3 artefacts; sprints of one month at most.
- Kanban: visualise, limit work in progress, measure flow; lead time = work in progress ÷ throughput.
- Hybrid keeps the contractual frame fixed and adapts activities in short, documented cycles.
- AI helps write stories and syntheses; the team estimates and the Product Owner orders.

Quiz

1. In Scrum, who orders the product backlog?
   A. The Scrum Master
   B. The donor
   C. The Product Owner
   D. The developers

2. The maximum length of a sprint according to the Scrum Guide is:
   A. One month
   B. One week
   C. Three months
   D. There is no limit

3. A team has 20 requests in progress and finishes 5 per week. Average lead time:
   A. 25 weeks
   B. 100 weeks
   C. 1 week
   D. 4 weeks

4. Velocity is used to:
   A. Compare teams with each other
   B. Forecast the team's work
   C. Calculate salaries
   D. Replace the budget

5. In a donor-funded hybrid approach, what generally stays fixed is:
   A. The logframe, the overall budget and the contractual milestones
   B. Every activity to the day
   C. Nothing
   D. The list of suppliers

Quiz answers : 1. C · 2. A · 3. D · 4. B · 5. A

Week 5 : Designing the project: Project DPro, theory of change, logical framework and results-based management

Objectives

- Describe the phases and disciplines of Project DPro (PMD Pro), the PM4NGOs framework for the sector.
- Move from problem analysis to the theory of change and then to the logframe, with sound vertical and horizontal logic.
- Use AI to speed up design (problem tree, first logframe, critique) without inventing data.

Project DPro: the sector's framework

Project DPro (second edition of **PMD Pro**, 2020) is published by **PM4NGOs**, an association created by international NGOs to adapt project management to development and humanitarian work. The guide is available free of charge in several languages, including French and Portuguese, and certification is managed by PM4NGOs with examination bodies.

The Project DPro life cycle follows five phases: **identification and definition**, **set up**, **planning**, **implementation** and **closure**, with **monitoring, evaluation and control** throughout. It stresses disciplines specific to the sector: stakeholder and partner management, integration of the logframe and MEAL, procurement and logistics management, donor requirements, sustainability and transfer.

PM4NGOs also offers **Program DPro** (programmes), **MEAL DPro** and **Finance DPro**. These are excellent free resources to complement this Mini MBA.

From problem analysis to objectives

Design starts from **needs data** (assessments, community consultations, secondary data) and a **stakeholder analysis**. A **problem tree** is then built:

- the **core problem** (trunk): for example "high prevalence of diarrhoeal diseases among children under 5 in camps A and B";
- the **causes** (roots): insufficient and untreated water, damaged latrines, risky hygiene practices, poor access to soap;
- the **effects** (branches): malnutrition, deaths, household health spending.

It is turned into an **objectives tree** (each problem becomes a desired situation), then the **strategy** is chosen: which branches to address, given the mandate, skills, budget and what other actors are doing (the cluster's 3W/4W mapping).

The theory of change

The **theory of change** explains *how and why* the activities will lead to the desired change. It makes the **assumptions** explicit: "if families receive soap and suitable awareness-raising, and if water is available within 500 metres, then handwashing at key times will increase, because the main barriers identified are the cost of soap and distance".

A good theory of change:

- relies on **evidence** (previous evaluations, literature, Sphere standards);
- identifies the **conditions** beyond the project's control;
- is **revised** when monitoring shows that an assumption does not hold.

It is often presented as a diagram and serves as the basis for the logframe and the MEAL plan.

The logical framework

The **logical framework** (*logframe*) summarises the project in a matrix of 4 columns and 4 levels. The levels (vocabulary varies by donor):

- **Overall objective / impact**: long-term change the project contributes to;
- **Specific objective / outcome**: change expected among beneficiaries by the end of the project;
- **Results / outputs**: goods and services delivered;
- **Activities**.

The columns: **intervention logic**, **indicators**, **means of verification**, **assumptions**. The **vertical logic** reads from bottom to top: if the activities are carried out and the assumptions hold, then the outputs are achieved, and so on. The **horizontal logic** checks that each level has measurable indicators and realistic sources.

Frequent mistakes: confusing output and outcome ("2,000 kits distributed" is an output, "80% of households use the kit correctly" is an outcome); indicators without a baseline or target; assumptions that are in fact major risks to be managed.

Results-based management

Results-based management (RBM), adopted by the UN system and many donors, consists of directing all decisions towards results rather than activities: planning from the desired outcomes, tracking results indicators, adjusting, reporting.

In practice: each monitoring meeting starts with "where are our outcomes?" before "what have we done?"; budget reallocations are justified by their contribution to results; reports talk about change, not just quantities delivered.

The **results framework** of some donors (for example UN agencies, or USAID before 2025) plays the same role as the logframe, with a different presentation: always identify the format the donor requires.

Designing faster with AI

A safe four-step method:

1. **Provide the data**: anonymised extracts from the needs assessment, actor mapping, donor priorities. "Work only from these documents."
2. **Ask for a structure**: "Propose a problem tree, then an objectives tree; flag causes the documents do not prove."
3. **Ask for a first logframe**: "Propose a logframe in [donor] format, with at most 2 outcomes and 4 outputs; SMART indicators; leave baselines and targets empty if they are not in the data."
4. **Ask for a critique**: "Act as the donor's evaluator: what weaknesses in the vertical and horizontal logic do you see?"

What AI must not do: invent baselines, targets or prevalence rates; replace community consultation; settle a strategic choice. The team validates everything, and the problem tree is discussed with communities and partners.

Exercise: correcting a logframe

Situation. A draft WASH logframe of the fictitious NGO Rahma contains: outcome "3,000 hygiene kits distributed"; output "30% reduction in diarrhoea"; outcome indicator "number of awareness sessions"; assumption "the project is well managed". Baseline of the indicator "households washing hands at key times": 35%; target requested by the donor: +25 points.

Task. 1) Which mistakes do you spot? 2) What is the target as a percentage? 3) Out of 3,000 households, how many additional households must adopt the practice?

Answer. 1) Outcome and output are reversed: the kits distributed are an output, the reduction in diarrhoea belongs rather to the overall objective or to a health outcome. The number of sessions is an activity indicator, not an outcome indicator: a change indicator is needed (handwashing rate). "The project is well managed" is not an external assumption: it is the team's responsibility. 2) 35% + 25 points = 60%. 3) (60% − 35%) × 3,000 = 750 additional households.

Key takeaways

- Project DPro (PMD Pro) from PM4NGOs is the project management framework designed for the sector, free and multilingual.
- Problem tree, objectives tree and strategy choice come before any planning.
- The theory of change makes assumptions explicit and relies on evidence.
- Logframe: vertical logic (if... then) and horizontal logic (indicators, sources); do not confuse outputs and outcomes.
- AI structures and critiques; it invents neither baselines nor targets, and does not replace consultation.

Quiz

1. Project DPro is published by:
   A. PM4NGOs
   B. PMI
   C. PeopleCert
   D. Scrum.org

2. "2,000 kits distributed" is:
   A. An outcome
   B. An impact
   C. An assumption
   D. An output

3. The vertical logic of a logframe reads:
   A. Top to bottom, column by column
   B. Bottom to top: if activities and assumptions hold, the higher level is achieved
   C. Left to right only
   D. In any direction

4. Baseline 40%, target +15 points, 2,000 households: additional households to reach?
   A. 150
   B. 800
   C. 300
   D. 1,100

5. When baselines are missing from the documents, AI should:
   A. Estimate them as best it can
   B. Leave the cells empty and flag it
   C. Use the global average
   D. Copy those of another country

Quiz answers : 1. A · 2. D · 3. B · 4. C · 5. B

Week 6 : Planning: scope, work breakdown, estimating and critical path

Objectives

- Define the scope and build a deliverable-oriented work breakdown structure (WBS).
- Estimate durations (analogous, parametric, three-point/PERT) and calculate a critical path with float.
- Build a realistic schedule (Gantt, milestones, resources) and use AI to spot omissions and dependencies.

Scope and the work breakdown structure

The **scope** describes what the project delivers, and what it does not. A clear scope statement contains the deliverables, acceptance criteria, exclusions, constraints and assumptions. Exclusions prevent **scope creep**: "the project does not cover borehole maintenance after handover to the management committee".

The **work breakdown structure** (WBS) breaks down the work hierarchically into deliverables, down to **work packages** small enough to be estimated, assigned and tracked (often 1 to 4 weeks of work). The 100% rule: the sum of the child elements represents exactly the work of the parent element, no more, no less.

Example. Project "Drinking water for 6 villages": 1. Project management; 2. Studies (hydrogeology, consultations); 3. Boreholes (6 boreholes, pumping tests, analyses); 4. Management committees (set-up, training); 5. Hygiene promotion; 6. Closure and handover. Each element is then broken down further. The **WBS dictionary** describes each package: content, owner, deliverable, criteria.

Estimating durations and effort

Four main techniques:

- **Analogous**: from a similar project (fast, not very precise);
- **Parametric**: from a ratio (for example 3 days of works per latrine per team);
- **Bottom-up**: estimating each WBS package and adding up (precise, long);
- **Three-point (PERT)**: with an optimistic (O), most likely (M) and pessimistic (P) estimate. Expected duration = (O + 4M + P) ÷ 6; standard deviation ≈ (P − O) ÷ 6.

Example. Customs clearance of medical equipment: O = 3 weeks, M = 4, P = 11. Expected duration = (3 + 16 + 11) ÷ 6 = 5 weeks, not 4: the risk of blockage pulls the estimate up. In humanitarian work, pessimistic durations (rainy season, access, authorisations) are often underestimated; involve logistics and security in estimating.

The network and the critical path

Activities are linked by their **dependencies** (most often "finish to start": B starts when A is finished). We then calculate:

- **early dates** (forward pass): the earliest start date of each activity;
- **late dates** (backward pass): the latest finish date without delaying the project;
- **total float**: the difference between late and early.

The **critical path** is the longest sequence of dependent activities; its activities have zero float. Any delay on the critical path delays the end of the project.

Example. A Site assessment (2 weeks); B Purchase of materials (4, after A); C Recruitment of teams (2, after A); D Training (1, after C); E Works (6, after B and D); F Acceptance (1, after E). Paths: A-B-E-F = 13 weeks; A-C-D-E-F = 12 weeks. Critical path: A-B-E-F, duration 13 weeks. C and D have one week of float. To shorten the project, act on procurement (B), not on recruitment.

Compressing a schedule

When the donor or the season imposes an earlier date:

- **fast tracking**: doing in parallel activities planned in sequence (starting works on the first sites before all purchases are complete). Low cost, higher risk of rework;
- **crashing**: adding resources to critical activities (a second team, air freight). Higher cost; choose the critical activities whose cost per week gained is lowest.

Careful: compressing a non-critical activity is useless, and a new critical path may appear. In the example above, reducing B by 2 weeks gains only one week: path A-C-D-E-F (12 weeks) becomes critical.

Gantt, milestones and resources

The **Gantt chart** shows activities on a timeline; it is readable by everyone, including the donor. **Milestones** are added (events with no duration: contract signature, interim report, handover).

Then **resources** must be checked: the same engineer cannot supervise three sites 300 km apart in the same week. **Resource levelling** shifts activities to respect availability, which may lengthen the project; **smoothing** shifts them only within their float.

Build the **real calendar** into the schedule: rainy season, religious holidays, election periods, procurement lead times (week 8) and recruitment, authorisation procedures. A humanitarian schedule with no margin for access and security is a wrong schedule.

Tools: a spreadsheet is enough for a small project; software such as MS Project, ProjectLibre (free), Smartsheet, Asana, monday.com or Jira suits larger ones. Many now include AI features.

Planning with AI

Useful requests:

- "From this scope, propose a deliverable-oriented WBS on 3 levels, respecting the 100% rule. Flag deliverables the scope does not specify."
- "Here is the list of activities and durations: identify missing dependencies and activities often forgotten in this type of project (authorisations, testing, training, handover, financial closure)."
- "Calculate the critical path of this table and show the detail of the forward and backward passes."

Always check the critical path calculation: AI assistants sometimes make mistakes in additions or multiple dependencies. For calculations, ask to see the detail, or use a spreadsheet or scheduling software. Do not share sensitive data on the exact location of teams or stocks in insecure areas.

Exercise: critical path and compression

Situation. Shelter project of the fictitious NGO Sakan. Activities: A Family registration 3 weeks; B Ordering kits 5 weeks (after A); C Site selection 2 weeks (after A); D Site preparation 3 weeks (after C); E Shelter assembly 4 weeks (after B and D); F Quality control 1 week (after E). The donor asks for completion in 12 weeks. Air freight for the kits: B becomes 3 weeks for USD 18,000.

Task. 1) Duration and critical path? 2) Float of C and D? 3) Does air freight make 12 weeks possible? What is the new critical path?

Answer. 1) A-B-E-F = 3 + 5 + 4 + 1 = 13 weeks; A-C-D-E-F = 3 + 2 + 3 + 4 + 1 = 13 weeks. Two critical paths, duration 13 weeks. 2) Zero float for C and D (they are critical too). 3) With B at 3 weeks, A-B-E-F = 11, but A-C-D-E-F remains at 13: the project still lasts 13 weeks. Air freight alone is useless; C or D must also be shortened by one week (for example a second site preparation team), or D and E overlapped.

Key takeaways

- The scope specifies deliverables and exclusions; the WBS breaks down all the work (100% rule).
- PERT estimate: (O + 4M + P) ÷ 6; involve logistics and security in estimates.
- The critical path is the longest sequence of dependent activities; its activities have zero float.
- Compressing a non-critical activity does not shorten the project; watch for a new critical path.
- AI proposes WBS and dependencies; check its calculations and build in the real field calendar.

Quiz

1. The 100% rule of the WBS means:
   A. The budget is 100% spent
   B. Child elements represent exactly the work of the parent
   C. Each activity lasts 100 hours
   D. The team is 100% available

2. PERT estimate with O = 2, M = 5, P = 14:
   A. 5
   B. 7
   C. 6
   D. 8

3. An activity on the critical path has a total float of:
   A. Zero
   B. One week
   C. Its own duration
   D. Always negative

4. Doing in parallel activities planned in sequence is called:
   A. Levelling
   B. Crashing
   C. Smoothing
   D. Fast tracking

5. Shortening a non-critical activity:
   A. Always shortens the project
   B. Does not shorten the project
   C. Lengthens the project
   D. Removes the critical path

Quiz answers : 1. B · 2. C · 3. A · 4. D · 5. B

Week 7 : Budget, cost monitoring and earned value

Objectives

- Build a project budget that complies with donor rules: direct costs, support costs, indirect costs, reserves.
- Monitor budget consumption (burn rate, variances, forecasts) and justify reallocations.
- Calculate and interpret earned value indicators (PV, EV, AC, CPI, SPI, EAC) and use AI for analysis without exposing sensitive data.

Building a donor budget

A project budget is built **from the WBS and the schedule** (bottom-up): each work package receives quantities and unit costs. The main categories, depending on donors:

- **Direct programme costs**: goods distributed, cash transfers, works, training;
- **Staff**: salaries and on-costs, with the percentage of time of each post on the project;
- **Direct support costs**: vehicles, field offices, communications, security, shared pro rata;
- **Indirect costs** (overheads, often 7% for the European Union and several UN agencies, variable elsewhere): not justified line by line;
- **Reserves**: some donors accept a limited contingency line, others do not.

A budget must be **realistic** (verified market prices, prudent exchange rates, inflation), **consistent** with the logframe (each output has resources), **compliant** (eligible expenditure) and accompanied by a **budget narrative** explaining the calculations.

Budget monitoring and burn rate

Each month, the project manager compares with finance: budget, actual expenditure, commitments (orders placed not yet paid) and forecast to completion. The **burn rate** = expenditure ÷ budget. It only makes sense compared with elapsed time and actual progress.

Example. In month 6 of 12, a project has spent 45% of its budget. Is that good? You cannot say without knowing what has been *achieved*: if only 30% of outputs are delivered, the project is spending too fast for what it produces. That is what earned value measures.

Reallocations between lines are regulated: often free below a threshold (for example 15% or 20% of a heading depending on the contract), subject to approval above it. Significant underspending is also a problem: it signals a delay and may lead to a reduction in funding.

Earned value management

Earned value management (EVM) combines scope, time and cost. Three measures, at a given date:

- **Planned value (PV)**: the budget of the work that should have been done by that date;
- **Earned value (EV)**: the budget of the work actually done;
- **Actual cost (AC)**: what that work actually cost.

From these we derive:

- **Cost variance** CV = EV − AC (negative = overrun); **cost performance index** CPI = EV ÷ AC (below 1 = paying more than the value produced);
- **Schedule variance** SV = EV − PV (negative = delay); **schedule performance index** SPI = EV ÷ PV;
- **Budget at completion** (BAC): the total budget;
- **Estimate at completion** EAC = BAC ÷ CPI if current performance continues; **estimate to complete** = EAC − AC; **variance at completion** = BAC − EAC;
- **To-complete performance index** (TCPI) = (BAC − EV) ÷ (BAC − AC): the cost performance needed to finish within budget.

A complete example

Cash and livelihoods project, BAC = USD 600,000, 12 months. At the end of month 6: PV = 300,000; the outputs actually delivered are worth EV = 240,000; actual expenditure is AC = 270,000.

- CV = 240,000 − 270,000 = −USD 30,000: cost overrun;
- CPI = 240,000 ÷ 270,000 ≈ 0.89: each dollar spent produces 0.89 dollars of planned value;
- SV = 240,000 − 300,000 = −USD 60,000: delay; SPI = 0.80;
- EAC = 600,000 ÷ 0.89 ≈ USD 675,000 (exact calculation: 600,000 × 270,000 ÷ 240,000 = 675,000); variance at completion = −USD 75,000;
- TCPI = (600,000 − 240,000) ÷ (600,000 − 270,000) = 360,000 ÷ 330,000 ≈ 1.09: you would need to be 9% more efficient than planned until the end to stay within budget, which is rarely realistic.

Decision: analyse the causes (higher prices? underestimated transfer fees? registration delays?), present options to the board (reduce an output, find savings, request a revision from the donor), and inform the donor early rather than in the final report.

Measuring earned value in a humanitarian project

The difficulty is measuring **EV**. Common methods:

- **Units completed**: 120 latrines out of 300 built = 40% of the package value;
- **Weighted milestones**: 20% at design, 50% at provisional acceptance, 30% at final acceptance;
- **50/50 or 0/100 rule** for small packages: 50% at start, 50% at finish;
- **Estimated percentage**: to be avoided unless based on verifiable criteria.

Careful: earned value measures what is delivered, not the effect on people. A project can have a CPI of 1 and produce no change if outputs are poorly targeted. Earned value is therefore combined with outcome indicator tracking (week 9).

Analysing the budget with AI, safely

An AI assistant can:

- check the **consistency** of a budget: lines with no link to the logframe, inconsistent quantities, wrong totals;
- explain **variances** from a budget-versus-actual table and draft a first explanatory note;
- calculate earned value indicators and produce a chart in a spreadsheet;
- write a clear **budget narrative** from your assumptions.

Precautions: use the tool approved by your organisation (detailed budgets contain salaries and contractual information); remove names and individual salaries; redo key calculations in the spreadsheet; never let AI "find" unit costs: they come from your quotes, market surveys and previous purchases.

Exercise: earned value of a nutrition project

Situation. Nutrition project of the fictitious NGO Shifa: BAC = EUR 400,000, 10 months. At the end of month 4: PV = EUR 160,000; EV = EUR 176,000; AC = EUR 200,000.

Task. 1) Calculate CV, CPI, SV and SPI. 2) Calculate the EAC if cost performance continues. 3) Is the project ahead or behind? Under or over budget? 4) What should be said to the board?

Answer. 1) CV = 176,000 − 200,000 = −EUR 24,000; CPI = 176,000 ÷ 200,000 = 0.88; SV = 176,000 − 160,000 = +EUR 16,000; SPI = 1.10. 2) EAC = 400,000 ÷ 0.88 ≈ EUR 454,545, a foreseeable overrun of about EUR 54,500. 3) Ahead of schedule (SPI 1.10) but over budget (CPI 0.88). 4) Being ahead does not justify the extra cost: find the cause (overtime to accelerate? input prices?), arbitrate between speed and cost, and present options before the overrun is confirmed.

Key takeaways

- The budget is built from the WBS and the schedule, with verified prices and a budget narrative.
- The burn rate only makes sense compared with actual progress.
- CV = EV − AC; CPI = EV ÷ AC; SV = EV − PV; SPI = EV ÷ PV; EAC = BAC ÷ CPI.
- A CPI below 1 signals an overrun; an SPI below 1, a delay; inform the donor early.
- AI checks consistency and explains variances; unit costs come from your quotes, not from it.

Quiz

1. EV = 90,000, AC = 100,000. The CPI is:
   A. 1.11
   B. 0.90
   C. 10,000
   D. −10,000

2. An SPI of 0.75 means the project is:
   A. Behind schedule
   B. Ahead of schedule
   C. Under budget
   D. 75% complete

3. BAC = 500,000 and CPI = 0.80. The EAC is:
   A. 400,000
   B. 580,000
   C. 500,000
   D. 625,000

4. Earned value (EV) corresponds to:
   A. Actual expenditure
   B. The total budget
   C. The budget of the work actually done
   D. The budget of the work planned to date

5. The unit costs in a budget must come from:
   A. Quotes, market surveys and previous purchases
   B. An AI estimate
   C. Another NGO's budget
   D. The donor's maximum amount

Quiz answers : 1. B · 2. A · 3. D · 4. C · 5. A

Week 8 : Risks, stakeholders, responsibilities and procurement

Objectives

- Keep a risk register: identification, qualitative analysis (probability × impact) and quantitative analysis (expected monetary value), responses and owners.
- Analyse and engage stakeholders, including communities, and clarify roles with a RACI matrix.
- Plan project procurement according to donor rules, and use AI to enrich risk analysis without exposing sensitive information.

The risk management process

A **risk** is an uncertain event that, if it occurs, has an effect on objectives: negative (threat) or positive (opportunity). An **issue** is a risk that has materialised.

The process, common to the PMBOK, PRINCE2 and Project DPro:

1. **Identify**: workshops with the team, partners, logistics, security; review of lessons from previous projects; context analysis;
2. **Analyse**: probability and impact, on a scale of 1 to 5; score = probability × impact;
3. **Plan responses**: for threats, **avoid**, **transfer**, **reduce** or **accept**; for opportunities, **exploit**, **share**, **enhance** or **accept**; and sometimes **escalate** to the higher level;
4. **Implement and monitor**: one owner per risk, triggers, a monthly review.

Phrase each risk in three parts: **cause**, **event**, **effect**. "Because of the rainy season (cause), the road to the East district may be cut (event), which would delay distributions by 4 to 6 weeks (effect)."

Quantitative analysis and reserves

For major risks, the **expected monetary value** (EMV) = probability × financial impact is calculated. Threats have a negative value, opportunities a positive value.

Example. Threat: cement price increase, probability 30%, extra cost USD 50,000: EMV = −USD 15,000. Opportunity: joint purchase with another cluster member, probability 20%, saving USD 10,000: EMV = +USD 2,000. Contingency reserve justified by these two risks: 15,000 − 2,000 = USD 13,000.

We distinguish the **contingency reserve** (identified risks, under the project manager's authority, included in the cost baseline) and the **management reserve** (unidentified risks, under management's authority, outside the baseline). Many donors do not accept a reserve line: risk coverage then relies on prudent price assumptions, revision clauses and the possibility of reallocating.

In humanitarian work, always include risks of **security**, **fraud and diversion**, **protection and sexual exploitation and abuse (PSEA)**, **reputation** and **sanctions compliance**.

Analysing and engaging stakeholders

Stakeholders are all the people and organisations that influence the project or are affected by it: affected populations (in their diversity: women, men, children, older people, people with disabilities, minorities), local and national authorities, community leaders, partners, the donor, the cluster, other NGOs, suppliers, armed groups in some contexts.

The **power/interest grid** helps prioritise: high power and high interest = **manage closely**; high power, low interest = **keep satisfied**; low power, high interest = **keep informed and consult**; low power, low interest = **monitor**. Careful: affected populations often have little formal power but are the project's reason for being. The Core Humanitarian Standard (CHS) requires their participation and access to feedback and complaints mechanisms, whatever their place on the grid.

The **engagement plan** specifies for each group the objective, channels, frequency and owner.

Clarifying roles: the RACI matrix

The **RACI** matrix shows for each deliverable or decision who is:

- **R** (Responsible): does the work;
- **A** (Accountable): approves and answers for it, **one person only** per line;
- **C** (Consulted): gives their opinion beforehand;
- **I** (Informed): is informed afterwards.

Example. "Selection of kit suppliers": R = logistics manager; A = procurement committee; C = project manager and finance; I = field coordinator. If a line has two A's, or none, decisions drag on or nobody answers for mistakes. The RACI is also an internal control tool: the same person must not order, receive and pay.

Project procurement

Procurement often represents more than half of a humanitarian budget. The **procurement plan** lists, at start-up, each major purchase: description, quantity, estimated amount, applicable procedure, lead time and date needed.

Procedure thresholds depend on the donor's and the organisation's rules: for example, direct purchase below a small amount, three quotes above it, open tender above a higher threshold. The full lead time (needs definition, tender, evaluation, contract, delivery, customs clearance) can exceed three months: it must appear in the schedule and on the critical path if necessary.

Contract types: **fixed price** (risk on the supplier, ideal if the need is well defined), **cost reimbursable** (risk on the buyer), **time and materials** (short services). **Framework agreements** with pre-selected suppliers greatly speed up emergency response.

Enriching risk analysis with AI

An AI assistant is useful to **broaden** thinking:

- "Here is our risk register for an urban cash project: which common risks in this type of project are missing? Classify them by category (security, fraud, protection, market, technology, reputation)."
- "Rephrase these risks in cause-event-effect format and propose two responses per risk."
- "Act as the donor's auditor: what control weaknesses do you see in this procurement procedure?"

Precautions: do not enter sensitive security information (routes, convoy times, location of stocks or people), nor named information about suppliers suspected of fraud. AI does not know your local context: probability and impact are assessed by the team, with security and partners.

Exercise: risk register and reserve

Situation. Shelter project of the fictitious NGO Waha, budget USD 900,000. Three risks: R1 devaluation of the local currency (probability 40%, impact −USD 60,000); R2 delayed customs clearance of tarpaulins (probability 50%, impact −USD 24,000 in storage and transport); O1 in-kind donation of timber by a local authority (probability 25%, gain +USD 16,000). Qualitative scale from 1 to 5: R1 probability 3, impact 4; R2 probability 3, impact 3.

Task. 1) EMV of each risk? 2) Justified contingency reserve? 3) Qualitative score of R1 and R2: which to address first? 4) One response for R2.

Answer. 1) R1: 0.40 × −60,000 = −USD 24,000; R2: 0.50 × −24,000 = −USD 12,000; O1: 0.25 × 16,000 = +USD 4,000. 2) 24,000 + 12,000 − 4,000 = USD 32,000, about 3.6% of the budget. 3) R1: 3 × 4 = 12; R2: 3 × 3 = 9. R1 is the priority. 4) Reduce: place the order earlier, prepare exemption documents in advance, plan a regional supplier; owner: logistics; trigger: documents not validated 4 weeks before arrival.

Key takeaways

- A risk is phrased as cause-event-effect, with an owner and responses.
- EMV = probability × impact; the contingency reserve covers identified risks.
- Power/interest grid, but affected populations always participate (CHS).
- RACI: only one A per line; separate ordering, receiving and payment.
- The procurement plan and its lead times are part of the schedule; AI broadens analysis without security data.

Quiz

1. Probability 20%, impact −USD 40,000. The EMV is:
   A. −USD 8,000
   B. −USD 40,000
   C. −USD 20,000
   D. +USD 8,000

2. Taking out insurance for a risk corresponds to the response:
   A. Avoid
   B. Accept
   C. Exploit
   D. Transfer

3. In a RACI matrix, the number of "A" per line must be:
   A. At least two
   B. Exactly one
   C. Zero
   D. Unlimited

4. The management reserve covers:
   A. Identified risks
   B. Salaries
   C. Unidentified risks, under management's authority
   D. Indirect costs

5. Which information must not be entered into an AI assistant?
   A. Convoy times and routes
   B. A list of risk categories
   C. A generic procurement procedure
   D. An empty register template

Quiz answers : 1. A · 2. D · 3. B · 4. C · 5. A

Week 9 : Steering with MEAL: indicators, monitoring, dashboards and AI

Objectives

- Build a MEAL plan linked to the logframe: SMART indicators, baselines, targets, disaggregation, sources and frequencies.
- Track progress with an indicator tracking table (ITT) and a dashboard, and turn them into decisions.
- Use AI to analyse quantitative and qualitative data while respecting humanitarian data responsibility.

The MEAL plan, backbone of project steering

MEAL stands for Monitoring, Evaluation, Accountability and Learning. The **MEAL plan** turns the logframe into a concrete system. For each indicator: precise definition, calculation method, baseline, target (total and per period), disaggregation (sex, age, disability, location), source and collection method, frequency, owner, intended use.

A **SMART** indicator is specific, measurable, achievable, relevant and time-bound. "Improve access to water" is not an indicator; "% of target households with at least 15 litres of drinking water per person per day (Sphere standard), by December 2027" is.

The MEAL plan also covers **evaluations** (baseline, mid-term, final), the **feedback and complaints mechanism** and **learning** moments (quarterly reviews, lessons-learned workshops). The PM4NGOs **MEAL DPro** guide is a free reference.

The indicator tracking table (ITT)

The **ITT** (Indicator Tracking Table) shows, for each indicator, the baseline, target, achievements by period, cumulative total and achievement rate. Donors often require it with each report.

Reading an ITT means comparing the **achievement rate** with **elapsed time**. In quarter 3 of 4 (75% of the time), an indicator at 45% calls for analysis: a late start that can be caught up, an access problem, an unrealistic target, or a poorly defined indicator?

Watch out for frequent mistakes: adding up people counted several times (one family receives three distributions: that is 3 distributions, but a single family); mixing people and households; presenting a percentage without the denominator; forgetting disaggregation by sex, age and disability.

From monitoring to decisions

Monitoring is useless if it does not change decisions. An effective one-hour **monthly performance review** examines, in order:

1. **outcome indicators** and community feedback: is change happening?

2. **outputs** and the schedule: are we on time?
3. the **budget** and earned value;
4. **risks and issues**;
5. **decisions**: who does what, by when.

The one-page **dashboard** combines these elements with colour codes (green, amber, red) defined in advance. For example: green if achievement is at least 90% of the time-based pro rata, amber from 70 to 89%, red below. Written thresholds avoid subjective debates.

Analysing data with AI

Quantitative data. AI can write spreadsheet formulas, clean a database (duplicates, outliers), calculate rates and disaggregations, propose charts and a first commentary. It can also run small calculations in versions with an analysis tool. Always check totals with an independent calculation.

Qualitative data. For hundreds of open answers, focus group notes or community feedback, AI can propose themes, count occurrences and extract representative quotes. Good practice: define the coding frame yourself or validate it; manually check a sample (for example 10% of answers); keep minority voices, which automated summaries tend to erase.

What AI must not do: process sensitive complaints (sexual exploitation and abuse, gender-based violence, fraud) outside the planned confidential channel; decide alone on a complaint's category; produce figures without a verifiable database.

Humanitarian data responsibility

The **IASC Operational Guidance on Data Responsibility** (2023) and the **ICRC Handbook on Data Protection** set the framework. Before entering data into an AI tool:

- **Minimise**: only the columns needed;
- **Truly anonymise**: remove names, phone numbers, registration numbers, precise GPS coordinates, and check that combinations (village + age + disability + household composition) do not make anyone identifiable;
- Think about **demographically sensitive data**: even without names, the location of an ethnic group or of displaced people can expose them;
- Use the **approved offer** of your organisation, whose terms exclude the use of your data for training;
- Respect the **consent** given at collection.

> Simple rule: if a leak of this file could harm a person or a group, it does not go into a non-approved AI tool, even "just for a summary".

Learning and adapting

The "L" in MEAL is often forgotten. For a project to learn:

- keep an **adaptive decision log**: date, finding, data, decision, approval;
- hold short **after-action reviews** after each major stage (what was planned? what happened? why? what to repeat or change?);
- share lessons with the cluster and partners;
- check the **assumptions** of the theory of change at least once every six months.

AI can help synthesise reviews and find lessons from past projects in your archived reports, provided it cites the source documents.

Exercise: reading an ITT and deciding

Situation. Child protection project of the fictitious NGO Amal, 12 months. Indicator: "number of children receiving individual case management". Annual target: 2,400 children. Achievements: Q1 450; Q2 620; Q3 530. Cumulative disaggregation: 58% boys, 42% girls, whereas the target population is 51% girls. Dashboard thresholds: green ≥ 90% of the time-based pro rata, amber 70 to 89%, red < 70%.

Task. 1) Cumulative total and achievement rate at the end of Q3? 2) Dashboard colour? 3) How many children in Q4 to reach the target? 4) What question does the disaggregation raise?

Answer. 1) 450 + 620 + 530 = 1,600 children; 1,600 ÷ 2,400 ≈ 66.7%. 2) Time-based pro rata at the end of Q3 = 75%; 66.7 ÷ 75 ≈ 89%: amber (just below green). 3) 2,400 − 1,600 = 800 children in Q4, well above the best quarter (620): actual capacity must be analysed before promising the target. 4) Girls are under-represented (42% against 51%): access barriers specific to girls? Unsuitable reporting channels? This must be discussed with communities and the team, without artificially pushing the figures, because case management must respond to a real need.

Key takeaways

- The MEAL plan details each indicator: definition, baseline, target, disaggregation, source, frequency, owner.
- Reading an ITT: compare the achievement rate with elapsed time; avoid double counting.
- A monthly review starts with outcomes and ends with written decisions.
- AI analyses anonymised data and feedback; check a sample and keep minority voices.
- Minimise, anonymise, approved tool, consent: no potentially harmful data in a non-approved tool.

Quiz

1. Target 1,000, 600 achieved at mid-project. Compared with the time-based pro rata (50%), the project is:
   A. Behind
   B. Ahead
   C. Exactly on time
   D. Impossible to say
2. One family receives three distributions. It counts as:
   A. Three families
   B. Zero families
   C. One family and three distributions
   D. Half a family
3. Before analysing community feedback with AI, you must first:
   A. Truly anonymise it and use an approved tool
   B. Translate it into English
   C. Delete negative complaints
   D. Ask the donor's permission
4. A complaint of sexual exploitation and abuse must be handled:
   A. By an automatic summary
   B. Publicly
   C. By the project manager alone
   D. Through the planned confidential channel, outside non-approved AI tools
5. The "L" in MEAL stands for:
   A. Logistics
   B. Learning
   C. Law
   D. Baseline

Quiz answers : 1. B · 2. C · 3. A · 4. D · 5. B

Week 10 : Donor reporting, change management and communication

Objectives

- Write accurate, consistent and results-oriented narrative and financial reports, with AI support and systematic checking.
- Manage contractual changes (reallocations, no-cost extensions, amendments) according to donor rules.
- Build a project communication plan and clear messages for each audience.

What a donor expects from a report

An interim or final report answers four questions: **what have we achieved** against the planned results? **Why** the variances? **What have we learned and changed**? **How was the money used**?

Common structure of the narrative report: summary; changes in context; progress by result (indicators with baseline, target, achieved, disaggregation); variances and corrective measures; accountability (feedback and complaints received, responses given); risks; lessons learned; sustainability; annexes (ITT, case studies, photos with consent).

The **financial report** follows the donor's format strictly, by heading, with variances explained. The project manager and finance reconcile narrative and financial: an output announced as "100% achieved" with a budget line 30% spent will raise questions.

Writing accurately: accuracy, honesty, results

Writing rules:

- Every figure has a **source** (database, ITT, distribution list) and a **date**;
- Talk about **outcomes** before activities: "72% of households report an acceptable food consumption score, against 41% at baseline" rather than "we distributed 3,200 vouchers";
- **Do not embellish**: a variance explained and corrected inspires more confidence than a doubtful success; an inaccurate statement may be considered a false declaration;
- Respect **dignity**: no miserabilist stories, no photos of identifiable children without informed consent, no information that could expose a person;
- Correctly **attribute** results shared with partners or other actors.

Writing a report with AI, a safe method

1. **Gather validated sources**: ITT, review minutes, financial report, anonymised community feedback, decision log.
2. **Give the donor's format** and length limits.

3. **Ask for a strictly sourced first draft**: "Write the Result 2 section using only these documents; for each figure, give the source document in square brackets; write [TO BE COMPLETED] if information is missing; do not invent any beneficiary quote."
4. **Check line by line** every figure and statement, then remove the bracketed references.
5. **Ask for a critical review**: "Act as the donor's programme officer: what questions would you ask? What inconsistencies between the narrative and the financial report do you see?"
6. **Final human review** by the project manager, finance and management.

Some donors publish rules on the use of AI in proposals and reports: check them, and be transparent if asked. Donors increasingly spot generic texts and unsourced figures.

Managing contractual changes

The most frequent changes:

- **Budget reallocation** between headings: free below a threshold set by the contract (often 10 to 20% of the heading concerned), subject to written approval above it;
- **No-cost extension**: extending the duration without increasing the budget; to be requested early, often at least one to three months before the end, with a justification and a revised plan;
- **Change of scope**: new sites, new activities, change of targets; almost always requires an amendment;
- **Change of partner or key staff**, if the contract mentions them.

The internal procedure follows integrated change control (week 2) and management by exception (week 3): impact analysis, board decision, request to the donor, baseline update after written approval, traceability in the change log. Expenditure incurred on an unapproved change risks being declared **ineligible**.

The project communication plan

The **communication plan** specifies, for each audience: what information, through which channel, how often, by whom. For example:

- **Steering committee**: one-page monthly highlight report, quarterly meeting;
- **Donor**: contractual reports, rapid alerts in case of significant variance, field visit;
- **Team**: weekly meeting, shared Kanban board;
- **Communities**: meetings, local radio, posters, in local languages, with information on criteria, dates and the complaints mechanism;
- **Authorities and cluster**: coordination meetings, 4W updates.

The number of communication channels in a team grows fast: $n \times (n - 1) \div 2$. A team of 6 people has 15 channels; at 12 people, 66. Hence the value of short meetings, shared minutes and a common tool.

Communicating with AI, for each audience

AI helps adapt the same content: executive summary for management, short message for communities, technical note for the cluster, social media post. Ask for **versions by audience**, with clear constraints: length, register, words to avoid.

For messages to communities: have them reviewed by native speakers and tested with a few people, especially for languages less present on the internet; machine translation can change the meaning of an eligibility criterion. For public posts: check the donor's visibility rules and your organisation's communication policy, and do not use AI-generated images presented as real photos.

Exercise: reallocation and extension

Situation. Project of the fictitious NGO Tamkin, budget EUR 750,000, 18 months. The contract allows each heading to vary by at most 15% of its initial amount without prior approval. The project manager wants to transfer EUR 26,000 from the "Equipment" heading (EUR 200,000) to the "Training" heading (EUR 120,000). Separately, in month 15, 22% of activities remain to be carried out because access was blocked for two months; the contract requires any extension to be requested at least 2 months before the end.

Task. 1) Variance of each heading? 2) Is approval needed? 3) Last month to request the extension? 4) What does the no-cost extension request contain?

Answer. 1) Equipment: −26,000 ÷ 200,000 = −13%; Training: +26,000 ÷ 120,000 ≈ +21.7%. 2) Yes: the Training heading exceeds 15%. Without approval, at most EUR 18,000 (15% of 120,000) could be transferred. 3) End in month 18, request at the latest by the end of month 16: act immediately, in month 15. 4) Justification (blocked access, documented), remaining activities and revised plan, unchanged budget with updated spending pace, requested duration (for example 3 months), risks and measures, impact on indicators and handover.

Key takeaways

- A report says what was achieved, why the variances, what was learned and how the money was used.
- Every figure has a source and a date; never embellish; respect people's dignity.
- With AI: validated sources, sourced first draft, line-by-line checking, human review.
- Reallocations above the threshold, extensions and scope changes require the donor's written approval.
- Communication plan by audience; messages to communities reviewed by native speakers.

Quiz

1. How many communication channels does a team of 8 people have?
   A. 16
   B. 64
   C. 28
   D. 56

2. A no-cost extension consists of:
   A. Extending the duration without increasing the budget
   B. Increasing the budget without extending
   C. Removing activities
   D. Changing donor

3. In a report, a flattering but unverifiable statement must be:
   A. Kept if it sounds good
   B. Moved to an annex
   C. Attributed to AI
   D. Removed or verified

4. Heading of EUR 50,000, threshold 10%. Maximum incoming transfer without approval:
   A. EUR 10,000
   B. EUR 5,000
   C. EUR 500
   D. EUR 50,000

5. An AI-generated image may be published:
   A. As a real photo of the project
   B. Without mention if it looks good
   C. Never presented as a real photo
   D. Only on WhatsApp

Quiz answers : 1. C · 2. A · 3. D · 4. B · 5. C

Week 11 : Leading the team, ensuring quality, working with partners and closing

Objectives

- Lead a humanitarian project team: servant leadership, team development, conflict, wellbeing.
- Manage quality (plan, assure, control) and work with local partners in a localisation approach.
- Close a project completely: acceptance, handover, administrative and financial closure, lessons learned.

The project manager's leadership

Recent frameworks (PMBOK, PRINCE2 7, Scrum) stress **servant leadership**: removing obstacles, clarifying priorities, protecting the team from interruptions, developing skills, rather than commanding and controlling every task.

Tuckman's model describes the stages of team development: **forming** (politeness, uncertainty), **storming** (conflict over roles and methods), **norming** (shared rules), **performing**, then **adjourning** at the end of the project. The project manager adapts their style: directive at the start, more delegating later.

In humanitarian work, add: the diversity of statuses (national and international staff, volunteers, partners), high staff turnover, stress and exposure to trauma. **Duty of care** includes security, mental health, sustainable working hours and fair treatment.

Managing conflict and negotiating

Five conflict modes (Thomas-Kilmann model): **collaborating** (seeking a solution that satisfies both parties, preferred for important issues), **compromising**, **competing** (emergency, security), **accommodating** (low stakes for yourself), **avoiding** (temporarily, to let tension subside).

The PMP exam values one approach: first understand the cause, in private, with the people concerned, before escalating. Example: the logistics manager and the field coordinator disagree on distribution dates. The project manager brings them together, has each set out their constraints (truck availability, families' farming calendar), looks for a common option (two distribution waves), then formalises the decision.

Quality: plan, assure, control

Quality is conformance to requirements and fitness for use. Three levels:

- **Plan**: applicable standards (Sphere, national technical standards, donor requirements), acceptance criteria for each deliverable, inspection plan;

- **Assure**: check that processes enable quality (team training, procedures, internal audits);
- **Control**: inspect deliverables (sampling, tests, post-distribution monitoring) and correct.

The **cost of quality** includes the cost of conformance (prevention, inspection) and the cost of non-conformance (rework, rejects, loss of trust). Preventing is almost always cheaper than correcting. The **Core Humanitarian Standard (CHS)** sets nine commitments on quality and accountability to affected people, useful as a checklist for the whole project.

Working with local partners

Many projects are implemented with or by **local and national organisations**. Localisation commitments (Grand Bargain) aim to strengthen their role, their direct funding and their decision-making power.

Good project management practice in partnership:

- design the project and budget **together**, including a share of indirect costs for the partner;
- a proportionate **partner assessment**, followed by a mutual capacity-strengthening plan rather than a simple list of requirements;
- **clear roles** (RACI) and shared governance (joint steering committee);
- fair **risk sharing**, including security: do not transfer risk to the partner without the means;
- **simplified and harmonised** reporting when possible.

Closing the project

Closure is often rushed, yet it determines sustainability and the final payment. Checklist:

- **Acceptance** of deliverables with beneficiaries, authorities or management committees (signed minutes);
- **Handover**: technical documents, committee training, maintenance plan, transfer or disposal of equipment according to donor rules;
- **Administrative closure**: supplier and staff contracts, archiving for the required period (often 5 to 10 years after the end), closing accounts;
- **Financial closure**: last eligible expenditure before the end date, reconciliations, refund of unused funds, audit preparation;
- **Communication** to communities about the end of the project and the remaining avenues of recourse;
- **Final report**, final evaluation if planned, and a **lessons-learned workshop**.

An **exit strategy** is prepared from the design stage: who maintains what after the project, with what resources?

AI for the team, quality and closure

Useful uses: preparing the agenda of a difficult meeting, practising a delicate conversation (AI plays the unhappy colleague), drafting quality control procedures, generating a closure

checklist adapted to the donor, synthesising lessons learned from several reports into themes, finding what past evaluations recommended.

Limits: do not use AI to assess the individual performance of a team member or draft a sanction based on personal information; do not paste HR or medical files; conduct, harassment and PSEA matters follow the organisation's confidential procedures.

Exercise: cost of quality

Situation. The fictitious NGO Bina is building 300 latrines. At the first inspection, 12% have defects (cracked slab, pit too shallow); each repair costs EUR 180. Additional training for masons and a mid-site inspection would cost EUR 2,000 and bring the defect rate down to 4%.

Task. 1) Cost of repairs without training? 2) Total cost with training? 3) Saving? 4) What other, non-quantified benefit should be mentioned?

Answer. 1) 12% × 300 = 36 latrines; 36 × 180 = EUR 6,480. 2) 4% × 300 = 12 latrines; 12 × 180 = EUR 2,160; plus EUR 2,000 for training and inspection = EUR 4,160. 3) 6,480 − 4,160 = EUR 2,320 saved. 4) Fewer health and accident risks for families, greater community trust, deadlines met, and better-trained masons for future projects.

Key takeaways

- Servant leadership; adapt your style to the team's stage of development (Tuckman).
- Conflict: understand the cause in private and seek a collaborative solution before escalating.
- Quality: plan, assure, control; prevention costs less than correction; CHS as a framework.
- Local partnerships: joint design, indirect costs, shared risks, shared governance.
- Closure includes acceptance, handover, administrative and financial closure, and lessons learned.

Quiz

1. In Tuckman's model, the stage where conflict over roles appears is:
   A. Performing
   B. Storming
   C. Adjourning
   D. Norming

2. For an important conflict between two managers, the mode to favour is:
   A. Avoiding permanently
   B. Competing
   C. Collaborating
   D. Accommodating

3. The cost of non-conformance includes:
   A. Rework and rejects
   B. Preventive training
   C. Internal audits
   D. The quality plan

4. The exit strategy is prepared:
   A. In the last month
   B. After the audit
   C. Never
   D. From the design stage

5. Which of these uses of AI must be excluded?
   A. Preparing a meeting agenda
   B. Assessing a colleague's performance from their HR file
   C. Drafting a closure checklist
   D. Synthesising lessons learned

Quiz answers : 1. B · 2. C · 3. A · 4. D · 5. B

Week 12 : AI for projects across the organisation: tools, governance and certification paths

Objectives

- Compare the families of AI tools useful for project management (assistants, office suites, project management software, agents) and their limits.
- Set up AI governance for projects: project management office (PMO), rules, use register, measuring value.
- Build your professional development plan: certifications (PMP, CAPM, PRINCE2, Project DPro, Scrum), practice and network.

Families of AI tools for projects

In November 2026, four families of tools coexist:

- **General assistants**: Claude (Anthropic), Gemini (Google), ChatGPT (OpenAI), Copilot (Microsoft). Drafting, summarising, analysing documents and tables, critique.
- **AI built into office suites**: Gemini in Google Workspace, Copilot in Microsoft 365 (Teams, Outlook, Excel, Planner). Meeting summaries, email drafts, table analysis, depending on subscriptions.
- **Project management software with AI**: Asana, monday.com, Jira and Confluence, ClickUp, Smartsheet, Notion, among others. Creating tasks from minutes, progress summaries, delay detection, automatic reports.
- **Agents**: assistants able to chain actions (read documents, update a table, send a reminder) with less human intervention. Powerful, but to be tightly framed: every action affecting people, money or sensitive data must remain validated by a human.

This programme is independent of all these providers. Features and prices change often: test on your real tasks, check data protection terms and any discounts for non-profit organisations.

Choosing and deploying: from trial to standard

Recommended approach:

1. **Inventory** existing uses, including shadow use (personal accounts);
2. **Choose 3 to 5 use cases** with high value and low risk: meeting minutes, first drafts of reports, work plans, budget consistency checks, syntheses of lessons learned;
3. **Pilot** for 8 to 12 weeks with a small group, measuring time saved, quality (errors found in review), satisfaction and incidents;
4. **Decide**: scale up, adapt or stop;
5. **Train** everyone, including national staff and partners, in the working languages.

Exclude from the pilot phase cases where AI would decide about people: targeting, beneficiary selection, candidate shortlisting, individual performance assessment.

Governing AI in projects

The **project management office** (PMO), where it exists, is well placed to frame AI: document templates, a library of validated requests, checking rules, training. Light governance includes:

- a short **use policy** (2 to 4 pages): authorised tools, data classification, prohibited uses, human checking, transparency, incident reporting;
- a **use register**: which tool, for which process, with which data, which owner;
- a **data protection impact assessment** before any use involving personal data;
- a periodic review: incidents, errors found, changes in tools and donor rules.

Useful references: the NIST AI Risk Management Framework, the UN system principles for the ethical use of AI, the UNESCO recommendation, the EU AI Act for the organisations concerned, and the IASC guidance on data responsibility.

Measuring value, honestly

Announced time savings are often **self-reported** and optimistic. To measure:

- compare the production time of the same type of document before and after, on a sample;
- count errors found in review and corrections requested by the donor;
- track incidents (data pasted by mistake, wrong figures sent);
- deduct checking time, which is part of the cost.

Present the result as an **estimate**, and say what the freed time is used for: more presence in the field, more listening to communities, better analysis. A time saving is not a budget saving until it is reinvested or observed.

Your certification path

Depending on your profile:

- **Beginner or career changer**: Project DPro (PMD Pro) for the sector's language, then CAPM or PRINCE2 Foundation;
- **Experienced project manager**: PMP (if you meet the experience requirements) or PRINCE2 Practitioner;
- **Digital and information management teams**: PSM or CSM, then PMI-ACP;
- **Multi-project programmes**: Program DPro, then PgMP for senior profiles.

Before paying for an exam: check on the official website the requirements, cost, language, format (online or at a centre) and renewal rules. The certificates of this Mini MBA attest that you passed its exams; they do not replace these external certifications, but prepare you for them and show recruiters your applied mastery in humanitarian work.

The 90-day development plan

To turn this programme into a lasting skill:

- **30 days**: apply three tools to your current project (one-page charter, risk register in cause-event-effect format, one-page dashboard);
- **60 days**: calculate your project's earned value and present it to the board; set up a monthly performance review;
- **90 days**: choose a certification and plan your preparation; propose to your organisation a library of validated AI requests for projects; share your lessons in the Mini MBA's exchange space.

> Method does not replace judgement. The best humanitarian project managers combine rigour, adaptation, listening to communities and caution with tools, including AI.

Exercise: business case for deploying AI for projects

Situation. The country office of the fictitious NGO Masar is considering licences for a professional AI assistant for 12 project managers: USD 30 per month per licence. Training: 4 hours per person, given by an internal trainer valued at USD 25 per hour, in two groups of 6. Pilot: self-reported saving of 3 net hours per week per person, over 46 working weeks, at an average hourly cost of USD 15.

Task. 1) Annual cost of licences? 2) Cost of training (trainer's time)? 3) Estimated annual value of freed time? 4) How should these figures be presented to management?

Answer. 1) 12 × 30 × 12 = USD 4,320. 2) 2 groups × 4 hours × USD 25 = USD 200 (not counting participants' time: 12 × 4 × 15 = USD 720). 3) 12 × 3 × 46 × 15 = USD 24,840. 4) As an estimate based on self-reporting, to be confirmed by measurements (time, errors, incidents); stating what the freed time will be used for; recalling the conditions: approved tool, use policy, human checking, no use for decisions about people.

Key takeaways

- Four families of tools: assistants, office suites, project management software, agents.
- Start with 3 to 5 high-value, low-risk use cases; exclude decisions about people.
- Light governance: short policy, use register, impact assessment, periodic review.
- Measure value honestly: time, errors, incidents, checking time.
- External certifications are obtained through official exams; this Mini MBA prepares you for them.

Quiz

1. An AI agent differs from an assistant because it:
   A. Speaks more languages
   B. Is always free
   C. Can chain actions with less human intervention
   D. Never makes mistakes

2. 10 licences at USD 20 per month cost per year:
   A. USD 2,400
   B. USD 200
   C. USD 240
   D. USD 24,000

3. Which use case should be excluded from a pilot phase?
   A. Summarising minutes
   B. Verified first drafts of reports
   C. Budget consistency checks
   D. Automatic candidate shortlisting

4. For a newcomer to the sector, a suitable first certification is:
   A. PgMP
   B. Project DPro (PMD Pro)
   C. PRINCE2 Practitioner
   D. PMP without experience

5. This Mini MBA's diploma:
   A. Replaces the PMP certification
   B. Is awarded by PeopleCert
   C. Attests success in its exams and prepares for external certifications
   D. Exempts from the PRINCE2 exam

Quiz answers : 1. C · 2. A · 3. D · 4. B · 5. C