



5.4.2 A Checklist for Preparing an Activity Schedule

Once the Logframe matrix itself is complete, it is then possible to use the identified Activities (which may or may not be actually included in the matrix itself) to further analyse issues of timing, dependency and responsibility using an activity scheduling (or Gantt chart) format (see Figures 36 and 37).

The format can be adapted to fit with the expected duration of the project in question and to the level of detail that it is useful and practical to provide. The first year's Activities may be specified in more detail (i.e. showing the indicative start and finish of Activities to within a week or month of their expected timing) while subsequent years scheduling should be more indicative (to within a month or a quarter). These are just preliminary estimates that will subsequently be revised by project management once implementation starts (i.e. in an inception report) and then should be continue to be reviewed and revised during implementation in the light of actual implementation performance.

A step-by-step approach to the preparation of a detailed activity schedule can be followed:

Step 1 – List Main Activities

The main Activities identified through the Logframe analysis are a summary of what the project must do in order to deliver project results. These can therefore be used as the basis for preparation of the Activity Schedule which helps to specify the likely phasing and duration of key activities.

An example of a detailed activity schedule, which has been completed following the steps listed below, is shown as Figure 37.

Step 2 – Break Activities Down into Manageable Tasks

This step may not be appropriate until Financing is approved and the project implementation phase has commenced.

The purpose of breaking Activities down into sub-activities or tasks, is to make them sufficiently simple to be organised and managed easily. The technique is to break an Activity down into its component sub-activities, and then to take each sub-activity and break it down into its component tasks.

Each task can then be assigned to an individual, and becomes their short-term goal.

The main skill is in getting the level of detail right. The most common mistake is to break the Activities down into too much detail. The breakdown should stop as soon as the planner has sufficient detail to estimate the time and resources required, and the person responsible for actually doing the work has sufficient instructions on what has to be done. This is where individual planning of tasks by project implementers starts.

Step 3 – Clarify Sequence and Dependencies

Once the Activities have been broken down into sufficient detail, they must be related to each other to determine their:

- *sequence* – in what order should related Activities be undertaken?
- *dependencies* – is the Activity dependent on the start-up or completion of any other Activity?

This can best be described with an example. Building a house consists of a number of separate, but inter-related Activities: digging and laying the foundations; building the walls; installing the doors and windows; plastering the walls; constructing the roof; installing the plumbing. The sequence dictates that digging the foundations comes before building the walls; while dependencies include the fact that you cannot start installing doors and windows until the walls have reached a certain height; or you cannot finish plastering until the plumbing has been fully installed. Dependencies may also occur between otherwise unrelated Activities that will be undertaken by the same person (i.e. the person may not be able to complete both tasks at the same time).

Step 4 – Estimate Start-up, Duration and Completion of Activities

Specifying the timing involves making a realistic estimate of the duration of each task, and then building it into the Activity Schedule to establish likely start-up and completion dates. However, it is often not possible to estimate timing with great confidence. To ensure that the estimates are at least realistic, those who have the necessary technical knowledge or experience should be consulted.



The most common problem arising in the preparation of activity schedules is to underestimate the time required. This can happen for a number of reasons:

- omission of essential Activities and tasks
- failure to allow sufficiently for interdependence of Activities
- failure to allow for resource competition (i.e. scheduling the same person or piece of equipment to do two or more things at once)
- a desire to impress with the promise of rapid results

Step 5 – Summarise Scheduling of Main Activities

Having specified the timing of the individual tasks that make up the main Activities, it is useful to provide an overall summary of the start-up, duration and completion of the main Activity itself.

Step 6 – Define Milestones

Milestones can provide the basis by which project implementation is monitored and managed. They are key events that provide a measure of progress and a target for the project team to aim at. The simplest milestones are the dates estimated for completion of each Activity – e.g. *training needs assessment completed by January 200x*.

Step 7 – Define Expertise

When the tasks are known, it is possible to specify the type of expertise required. Often the available expertise is known in advance. Nonetheless, this provides a good opportunity to check whether the action plan is feasible given the human resources available.

Step 8 – Allocate Tasks Among Team

This involves more than just saying who does what. With task allocation comes responsibility for achievement of milestones. In other words, it is a means to define each team member's accountability - to the project manager and to other team members.

Task allocation should therefore take into account the capability, skills and experience of each member of the team. When delegating tasks to team members, it is important to ensure that they understand what is required of them. If not, the level of detail with which the relevant tasks are specified may have to be increased.





5.4.3 Preparing resource and cost schedules

Cost estimates should be based on careful and thorough budgeting. They will have significant influence over the investment decision at project appraisal and subsequently on the smooth implementation of the project if the go-ahead is given. Again, the list of Activities should be copied into a Resource Schedule pro-forma. Each Activity should then be used as a checklist to ensure that all necessary resources/inputs required under that Activity are provided for. Budgeting of management activities should not be forgotten at this stage.

Once the Activities have been entered into the schedule, the resources necessary to undertake the Activities must be specified. As there will be a need to aggregate or summarise the cost information, the resources should be allocated to agreed cost categories.

For example, in Figure 38 the activity of establishing a Planning Unit requires Equipment and Salaries and Allowances. *The Units, Quantity Per Period, and estimated Unit Cost* should then be specified. If entered on a spreadsheet, *Cost per Period* and *Total Project Cost* can be calculated using simple formulae.

Project costings should allow the allocation of costs between the different funding sources so that each party is clear about their respective contributions. The code for *Funding Source* can then be used to sort all costs and to determine respective totals. Those providing funding for the project are likely to have cost codes for each established cost category. By specifying the *Cost Code*, costs can again be sorted to determine total cost by cost category.

It is now possible to *schedule cost* per planning period using simple formulae to multiply the annual quantity by the unit cost. Once *Total Costs* have been calculated, it is important to remember that the implementing agency will be required to meet any recurrent costs of maintaining service provision beyond the life of the project. *Recurrent Costs* may be covered (fully or partly) through increased revenue that has been generated through project Activities. Whether or not this is the case, it is important that the net recurrent cost implications of the project are clearly specified so that the future impact on the implementing agency's budget can be determined.



Figure 38 – Preparing a Resource Schedule

Steps in the Preparation of a Resource Schedule

