Step 2: Establish Leadership and Management Structure

This step involves creating a seamless project team that is responsible for defining and sustaining collaboration, ensuring quality service delivery and managing the programme’s human, financial and technical resources. Effective management of the partners and implementation of the model are best ensured by the appointment of a strong and experienced project manager at each site. In addition to the project manager, the basic management team should include a community services leader and a clinical leader.

Objectives
• Select an experienced project manager
• Develop a project charter that specifies the management structure for the programme, objectives and deliverables

Expected Outcomes
• Identification of a project manager
• Development of a project charter

Identification of a Project Manager
The project manager leads the team and should be selected prior to holding adaptation workshops and exercises. Consider selecting among those working in HIV/AIDS and other social service fields who successfully serve populations difficult to reach and engage. It does not matter if the project manager comes from government, from the community or from an outside consulting firm—it is essential only that the project manager treat all partners equally and be qualified and be experienced in project management.
Profile of an Effective Project Manager

Required skills and experience:

- Strong leadership and governance experience
- Establishing solid policies
- Assigning roles
- Creating incentives
- Ensuring accountability
- Hiring and motivating staff
- Ensuring outstanding staff performance

Primary tasks for the project manager will include:

- Bringing diverse stakeholders together
- Managing project resources efficiently
- Keeping partners focused on program goals and objectives
- Working efficiently with governments, the business sector and community organizations
- Remaining focused on overall project outcomes

An example of a project manager job description and employment contract are found in Tool No. 6.
Field Story 4 Effective Project Managers at the Four Sites

Bobonong, Botswana: Because a strong manager was not identified at an early stage in Bobonong, the CBTS programme initially experienced multiple difficulties and delays in implementation. Approximately six months into the project, a skilled project manager was found, but by this time the goodwill and momentum between partners had decreased. The project manager had to go back to the stages of advocating for the project and igniting the partnership and collaboration. Although she confronted great challenges, she recruited qualified and compatible personnel, revised and clarified roles and responsibilities and built an impressive team spirit among all the stakeholders. Soon thereafter, the team became a cohesive unit and the project made up the time it had lost. The team was awarded the SECURE THE FUTURE prize for superior performance at a special awards event in November 2006.

Maseru, Lesotho: The project management came from the government. A key doctor with the Ministry of Health was seconded from her post as director of the Disease Control Unit of the national Ministry of Health and Social Welfare to head the programme. Although a clinician herself, she allowed the physicians working in the clinic to take the lead on purely clinical matters. As project manager, she focused on planning, management, documentation, administration, stakeholder management and advocating for the programme. She also listened to stakeholders, resolved conflicts and took responsibility for decisions that impacted several different stakeholders.

Mbabane, Swaziland: The government made its own selection for programme management and chose an NGO, the Swaziland Infant Nutrition Action Network (SINAN), which was well established and respected for project management skills and office infrastructure.

Katima-Mulilo, Namibia: The project management was outsourced to a private consultancy firm, New Dimensions Consulting. As their offices were in Windhoek—a three-hour flight from the site in Katima-Mulilo—they appointed a project manager based in the Caprivi Region who visited very often, and their active involvement in the project was always felt by the community. This management structure also succeeded in providing both supervision and a voice for the rather large number of community organizations involved in the programme.
Development of a Project Charter

A project charter is a management tool that articulates the project vision, objectives and scope, as well as the responsibilities of the partners. It describes how the partnership will function, communicate, monitor its progress and report to stakeholders. An example of such a charter is to be found in Resource No. 4.

The contents of the charter should include:

- Project goals, vision and objectives
- Project management structure
- Roles, responsibilities and reporting commitments of the partners

The goals and vision have been stated during the development of the business, and the objectives will flow from them.

The project management structure is best determined in a participatory fashion. SECURE THE FUTURE found it effective for the project manager to introduce a management structure proposal at one of the workshops to adapt the CBTS model. Broad discussion of the plan by the stakeholders helps to ensure common ownership and compliance. The resulting management structure should specify the roles and reporting relationships between partners. It should also specify how partners will monitor progress and their reporting responsibilities to stakeholders.

The project manager should have sufficient authority to carry out the job effectively. Project managers can also rely on governance boards and management committees composed of local leaders and government representatives for strategic advice and support. These bodies can play an important role in building government and community support for the programme, but they should not be involved in daily management of the project. The project manager might consider developing small technical groups for each major function (e.g., clinic, community services and finance), which in turn form a larger technical working group for decisions on cross-functional activities. Technical working groups can be established to supervise daily activities.

An example of a project management structure from the Senkatana project in Lesotho is explained and shown after Field Story 5 and Figure 3. Note that both direct authority and administrative reporting relationships are detailed.

A series of tools to assist project managers and other project staff are to be found in Tool No. 7, Tool No. 8, Tool No. 9 and Tool No. 10.
In Lesotho, an Implementers’ Forum was created to give a wide range of team members a role in managing the programme. The forum, which meets monthly, provides managers and service providers with a common venue for sharing achievements and resolving problems. All of the key project implementers participate in the forum, including people involved in project management, clinical and community-service providers and people living with HIV/AIDS. The management structure of the site in Lesotho, as shown in Figure 3, had clear roles and assignment of roles.

In Namibia, the project team integrated its project with a government structure called the Caprivi Regional AIDS Co-ordinating Committee, which is part of the national AIDS strategy and response. The Caprivi committee and district health teams became key members of the project’s management committee and provided policy guidance and alignment with national guidelines.

*Staying close to beneficiaries, Dr. Zengani Chirwa, Mapilelo Chief Medical Officer, and co-chair Caprivi RACOC, consults with his clients Helen and Calvin Myomellow.*
LESOTHO PROJECT MANAGEMENT STRUCTURE

**Project Management Team (PMT)**

**Project Steering Committee (PST)**
- Provision of overall coordination and oversight of all project components
- Define policies and procedures
- Approve annual workplans and budgets
- Creating/adapting new project activities
- Monitor the implementation of activities

**Lesotho Medical Association (LMA)**
- Oversee programme planning, implementation and monitoring of the project
- Provide regular reports to MOHSW & BMS
- Allocation of roles and responsibilities

**Project Director**
- Co-ordinating implementation in accordance with project proposal and annual workplans
- Manage staff and project administrator
- Prepare regular progress reports
- Establish and maintain mechanisms and systems to monitor all project activities

**Project Administrator**

**Disease Control Division**
- MOH HIV/AIDS
- Oversee implementation of all programme components
- Provide technical support to project
- Monitor implementation of activities

**Private general practitioners**
- Provide overall guidance and supervision of clinical services
- Manage and train clinical staff
- Ensuring adherence to guidelines and protocols for the management of opportunistic infections and provision of ARVs
- Advising on ARV regimen change
- Ensure record-keeping
- Regular monitoring and evaluation of clinical and laboratory performance

**Tabfin Financial Services**
- Effective financial management
- Disbursements and accountability for funds

**Public Partners**
- Ministry of Health and Social Welfare
  - Directorate HIV/AIDS and STIs
  - Botsabelo Communicable Disease Clinic

**Private Partners**
- Bristol-Myers Squibb
- National Drug Service Organisation
- Private general practitioners
- Tabfin Financial Services

**Non-profit Partners**
- Christian Health Association of Lesotho
- Lesotho Medical Association
- People living openly with HIV/AIDS (PLOWA)
- Tsepong Counselling Centres

Facilitated and funded by the Bristol-Myers Squibb’s Secure the Future™ Programme
Lessons Learned

- Identify a strong project manager trained in project management early in the planning stage and assign that person adequate authority
- Establish a management structure with clear roles, responsibilities and reporting relationships through collaborative and transparent workshops
- Place equal importance on the role of all partners

Tools for this step

- Tool No. 6 Extract from project manager employment contract
- Tool No. 7 Site visit checklist and report
- Tool No. 8 Monthly progress report to all partners
- Tool No. 9 Change request form
- Tool No. 10 Risk management template

Resource for this step

- Resource No. 4 Sample project charter