



PM4NGOs

A quick Guide to the

DPro Suite

Project DPro, Program DPro,
Finance DPro, and MEAL DPro

Publisher

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This is “A Quick Guide to the DPro Suite” compiled by PM4NGOs Board Member, Peter Marlow, and based on the current Guides to Project DPro, Program DPro, Finance DPro and MEAL DPro.

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[Previous Versions and History:](#)

Preface

This Quick Guide introduces the family of methodologies collectively known as Development Professional (DPro) comprising Project DPro, Program DPro, Finance DPro and MEAL DPro. It describes each member of the family and shows how they fit together. This should enable you to choose the methodologies you want to explore and what to do next. Detailed Guides for each methodology are available for free download from the PM4NGOs website at <http://www.pm4ngos.org>.

CHAPTER 1. INTRODUCTION

What?

The Development Professional (DPro) family brings together and deep-dives all aspects of managing successful development and humanitarian projects. DPro is built on the extensive experience of organizations and professionals who work in these sectors. This comprehensive family of methodologies comprises project management, program management, financial management, and monitoring and evaluation (MEAL).

The aim of the DPro family is to improve the project management capacity of development and humanitarian professionals, providing a contextualized, balanced, comprehensive, and adaptable body of knowledge and toolkit to help increase the efficiency and effectiveness of all aspects of projects in the sector.

The DPro family has four components covering the main aspects of managing projects:

- Project DPro (formerly PMD Pro) - Project Management for Development Professionals;
- Program DPro - Program Management for Development Professionals;
- Finance DPro (formerly FMD Pro) - Financial management in projects;
- MEAL DPro - Monitoring, evaluation, accountability and learning in projects;

For each component of the DPro family there is a full Guide which contains plentiful practical advice of how to run development programs and projects. These Guides are available in multiple languages and are downloadable for free from the PM4NGOs website at <http://www.pm4ngos.org>. A brief description of each component follows in the chapters below.

The DPro family is designed for:

- Individuals and organizations including development or humanitarian professionals working at the local, national, or international levels who want to explore specific topics and are considering seeking a certification;
- Development organizations who want to professionalize and certify their staff;
- Development organizations who want to ensure consistent approaches, tools and language across their staff and partners;
- Consultants/contract staff operating in the development sector;
- Public sector team members working on development initiatives in their respective countries and regions;

Internationally recognised certifications are available for each of the DPro family members – more details are provided at the end of each chapter.

Why?

Development and humanitarian organizations manage their work through projects. Their offices are staffed by project officers who manage project teams. In turn, the

project team writes project proposals, develops project plans, implements project activities, monitors project progress and finances, and evaluates project impact. Then, most importantly, beneficiary communities invest their time, energy, and resources in the projects. They trust the projects to build upon their collective strengths, to reinforce their areas of comparative weakness, and to solve the challenges that otherwise might be considered out of their control.

While the livelihoods of hundreds of millions of people depend on the ability of development and humanitarian organizations to deliver project results effectively and efficiently, project management is seldom identified as a strategic priority for organizations. There tends to be a focus on the technical programmatic areas of projects such as public health, education, child protection, WASH, advocacy, and so on. Organizations tend to hire technical, programmatic specialists who are then asked to manage projects and lead project teams. These technical, programmatic specialists tend to be very good at identifying treatment protocols for illnesses, developing curricula for schools, designing improved agricultural systems, and analyzing the root causes of poverty. However, they may not have much experience and skills in project management. For example, would they know if project estimates are accurate? Have project risks been anticipated and are they thoroughly controlled? Are project plans comprehensive and detailed? Is project progress monitored at all levels? Are project challenges identified, tracked and addressed? And, are all aspects of the project proactively managed throughout the life of the project? Are the social changes the project wishes to address being achieved?

So, the Guide to Project Management for Development Professionals (PMD Pro) was launched in 2010 following a request to LINGOs¹ to develop sector appropriate and comprehensive project management learning materials for NGOs. The sponsors included Save the Children, Oxfam, Care, World Vision, Habitat for Humanity, CRS, Plan International and Mercy Corps. A new independent NGO called PM4NGOs was established to own the certification. In March 2020 an updated second edition was published and rebadged as Project DPro to align with the new Program DPro Guide published in 2019. FMD Pro was developed by Mango¹ and joined the family in 2020, rebadged as Finance DPro. MEAL DPro which was developed jointly by CRS, Humentum and the Humanitarian Leadership Academy joined the DPro family in 2022.

How?

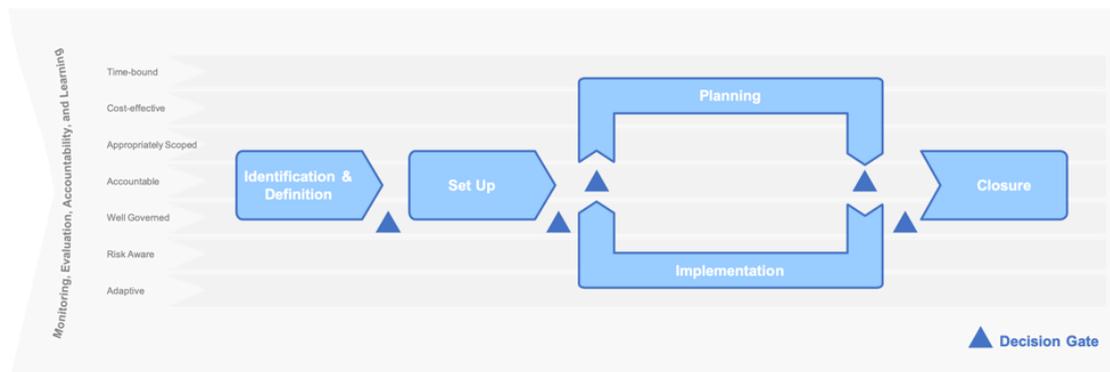
In this Quick Guide we'll look at each of the DPro family members in turn and show how they can deepen and expand your knowledge. We'll also take a look at the certifications and support available.

¹ LINGOs and Mango are now part of Humentum

CHAPTER 2. PROJECT DPRO

Project Management for Development Professionals – Project DPro, formerly PMD Pro – provides an introductory, independent exploration of project management within the context of the development and humanitarian sectors.

Some of the methodology will be familiar to readers but other parts are specific to development. Project DPro uses a **phase model** approach, providing guidance on what ought to be covered in each phase of the project.



The Project DPro Phase Model

The five phases of Project DPro are:

- ✓ **Identification and Definition:** It is during this phase that the project teams identify and define needs, explore opportunities, analyse the project environment, and design alternatives for project design. The decisions made during the Project Identification and Definition Phase set the strategic and operational framework within which the project will subsequently operate.
- ✓ **Project Set Up:** It is during this phase that the project is officially authorized and its overall parameters are defined and communicated to the main project stakeholders. It is also during this phase that the project team establishes the high-level project governance structure.
- ✓ **Project Planning:** Starting from the documents developed in earlier phases of the project, the team develops a comprehensive and detailed implementation plan and supplementary plans (e.g., supply chain) that provides a model for all the work of the project. These plans are revisited throughout the life of the project and updated (if necessary) to reflect the changing contexts of the project.
- ✓ **Project Implementation:** The day-to-day work of project implementation is to lead and manage the application of the project implementation plan: Leading the team, dealing with issues, managing the project team and creatively integrating the different elements of the project plan.
- ✓ **Project Closure:** This phase includes implementing all the transition activities that need to occur at the end of a project, including (but not limited to) confirming the deliverables with beneficiaries, collecting lessons learned, and completing the administrative, financial and contractual closure activities.

Threading through each of the phases are the **five Principles of Project Management**:

- ✓ **Well-Governed:** The governance structure of a project provides a framework for management and decision-making, clearly articulating the roles, responsibilities, and setting tolerances.
- ✓ **Participatory:** Participation of stakeholders throughout the entire life of the project is important for ensuring ownership and ultimately project success.
- ✓ **Comprehensive:** Equal rigor and attention must be applied to each phase of the project, and learning from each stage transferred to the next.
- ✓ **Integrated:** Phases, tools and processes in a project are not silos, they cannot efficiently function together unless they are integrated with one another.
- ✓ **Adaptive:** Change happens. The project manager, team and stakeholders must be adaptive to analyze the changing project environment and respond as necessary.

A cross-cutting theme throughout the whole project lifecycle is **Monitoring, Evaluation, Accountability and Learning (MEAL)** - *Monitoring* tracks the operational work of the project against the plan. *Evaluation* tends to focus on tracking progress on project outcomes. *Accountability* and *Learning* ensure that there are mechanisms in place to request and receive feedback from stakeholders during the project, learn from that feedback, and use it as a tool for iterative project planning. See the MEAL DPro chapter below.

Unlike some other project management methodologies, Project DPro describes and demonstrates project management tools suitable for development projects with examples and case studies. For example, the Problem Tree and Objectives Tree to help identify needs and interventions, and the Logical Framework or 'Logframe' for mapping the project intervention logic against activities, outputs, outcomes and goals.

Like other successful project management methodologies, Project DPro is not a robotic or template driven process. It can and should be adapted to suit organisations and particular situations.

Internationally-recognised qualifications for Project DPro are available:

- *Project DPro Foundation certificate* is an open-book online examination consisting of **75 multiple choice** questions. The pass mark is **65%** – or **49 correct answers**. An incorrect answer does not lose you marks.
- *Project DPro Practitioner certificate*. To achieve this, you need to have already passed the Foundation examination for Project DPro. The Practitioner qualification tests your ability to *apply* and *analyse* the contents of the Guide by completing activities from three areas: Professional Development, Informal Learning, and Giving Back.

More information about the exams and how to register is available at www.pm4ngos.org together with a list of training partners. There's also a website at <https://pmdprostarter.org> with videos and tools to get you started in your learning. There's also a Quick Guide to Project DPro at <https://www.pm4ngos.org/quick-guides/>.

CHAPTER 3. PROGRAM DPRO

Program Management for Development Professionals – Program DPro - provides Program Managers with advice, tools, and guidance and assists them in more effectively fulfilling their role, whether that be at the local, regional, or international levels. It builds on the Project DPro approach.

Program DPro identifies **four critical Phases** of program management throughout the program lifecycle:

- 1) **Identification:** This phase is crucial in developing ideas and identifying the needs, gaps, and opportunities for targeted communities. This process is done collaboratively with key stakeholders in order to identify high-level goals and outcomes that can be turned into tangible concepts. Obtaining funding and "buy-in" from stakeholders will be sought for the concepts developed in this phase.
- 2) **Design:** After the program concept is identified, it's time to set the foundations of the program by showing how each of its diverse elements will fit together. This is sometimes called a roadmap or a blueprint. It is the framework through which Program Managers can control, monitor, and execute all of the components associated with implementation. Once the program is underway, its design is regularly reviewed and adapted as part of the learning and improvement process.
- 3) **Planning and Implementation:** Assuming that the program is funded and the Identification and Design phases are complete, it is now time to start developing plans and scheduling activities. These will continue to be modified and adjusted throughout the life of the program. Program Managers invest time in managing and leading different teams, engaging key stakeholders, responding to the challenges and risks (known and unknown) of multiple projects, and overseeing internal controls.
- 4) **Closure:** Programs should always come to a natural end, closing when each of their constituent projects are completed, with their benefits realized and accepted by all stakeholders. This should also involve a transition period through which an NGO transfers responsibility and accountability for sustaining the program outcomes and benefits to another agency or means.

threading through each of the phases are the **five essential principles**, also found in Project DPro, that are common to all phases of the program lifecycle:

- 1) **Well-Governed:** Good governance is essential to the program's success and should be emphasized at all times in the program's lifecycle. The principle of Well-Governed provides the management framework in which program decisions are made. It also defines the roles, responsibility, authority, and accountability for each component project.
- 2) **Participatory:** Programs should be as inclusive as possible with the Program Manager seeking the perspectives of stakeholders throughout each phase. Using the participatory principle in program management ensures that the implementation reflects the current context and capacities of all those involved.



- 3) **Comprehensive:** A good program plan needs to demonstrate a thorough understanding of how each component part (project) fits together to create a greater whole. Additionally, incorporating this principle provides the opportunity to show how each of the elements combines to provide the leverage and added value of working in a comprehensive way.
- 4) **Integrated:** It is essential that processes be aligned and coordinated throughout all phases of the program lifecycle. The integrated principle ensures that each component part of the project combines effectively in order to operate smoothly as a whole.
- 5) **Adaptive:** This principle highlights the importance of ensuring that management processes are revisited and repeated throughout the life of the program. The reason this is so important is to ensure that designs and plans are still relevant and that ongoing learning is captured *and acted upon* to improve efficiency and allow for adjustments to be made to keep the program on track.

Along with the phases and principles, there are **four program essentials** that will be fundamental to the program's success:

- 1) **Plan, Do, Review** is an iterative process that enables the Program Manager and the team to be flexible and adaptive in the approach. It involves checking operational activities against project and program plans, reporting on progress, and making sure that all outputs continue to align with the overall vision and plan.
- 2) **Monitoring, Evaluation, Accountability, and Learning (MEAL):** Achieving goals and being accountable are central concepts for the Program Manager. See the MEAL DPro section below.
- 3) **Theory of Change (ToC):** This concept is being used increasingly in the NGO sector. It's a tool that outlines the strategic intent of the organization by illustrating how the change will take place (or flow) from projects and activities all the way up to the portfolio level of the organization. In essence, it describes how the organization will realize the change it would like to see.
- 4) **The Six Disciplines of Program Management** are essential skills which can all be developed and practiced. The most important element is to be able to combine them in a strategic context. They are not included as a separate section in the Program DPro Guide but rather are embedded as essential competencies within each phase and covered in greater detail within the sections detailing the **Comprehensive** and **Integrated** principles of program management. They are:
 - i. **Justification:** Throughout each program phase, it is important to step back and assess whether approaches are still relevant and justifiable.
 - ii. **Time:** A program must be delivered to scope, on time, and on budget. If each of these is delivered successfully, a program can be regarded as closed. The relationship is often referred to as the *Triple Constraint*.
 - iii. **Scope:** It is important to understand and describe all of the work, activities and resources needed to achieve the overall goals and aims of a program.
 - iv. **Financial:** The Program Manager doesn't need to be an accountant but does need to understand and formulate budgets, and able to forecast financial needs. See the section on Finance DPro below.

- v. **Risk:** Managing and controlling risks that could impact program deliverables.
- vi. **Stakeholders:** Management of stakeholders and their expectations is crucial.

An Internationally-recognised qualification for Program DPro is available:

- *Program DPro Foundation certificate* is an open-book online examination consisting of **75 multiple choice** questions. The pass mark is **65%** – or **49 correct answers**. An incorrect answer does not lose you marks.

More information about the exams and how to register is available at www.pm4ngos.org together with a list of training partners. There's also a Quick Guide to Program DPro at <https://www.pm4ngos.org/quick-guides/>.

CHAPTER 4. FINANCE DPRO

Financial Management for Development Professionals – Finance DPro, formerly FMD Pro - provides a contextualized, comprehensive, and adaptable resource for project professionals who work in the development, humanitarian, and conservation sectors. It aims to give them a fundamental understanding of financial management and control based on best accounting practises. The Finance DPro Guide contains many worked examples and case studies.

Financial management: This section of the Guide describes what financial management means in practice; identifies financial management roles and responsibilities at different levels in the organization, including for project staff; explains the Plan–Do–Review process and the financial planning process; outlines the four building blocks of good financial management systems; describes the purpose and contents of a finance manual; and explains the seven principals of financial management: consistency, accountability, transparency, viability, integrity, stewardship and accounting standards.

Financial control is the foundation for strong financial management. While there is no universal standard for a financial management system, Finance DPro uses the four building-block model as a framework for good practice:

- **Accounting records:** This section explains why we need to keep accounts and which records to keep; describes the difference between financial accounting and management accounting; describes how to sort financial transactions using accounting codes; outlines two different methods used to record financial transactions; describes the process used to account for cash advances; and describes the '3 Ps of procurement': process, people, and paperwork.
- **Financial planning:** This section describes how the financial planning process works in programs; describes different budget formats; describes the three main types of budgets, income & expenditure, capital, and cash-flow forecast; explains how to create an activity-based budget using a budget worksheet; and explains why it is important to budget for central support costs.
- **Financial monitoring:** This section identifies who needs financial reports and why; describes the different types of financial reports for program management

and stakeholder accountability; explains how to use the information in budget monitoring and other management reports; outlines the main features and purpose of reports to funding agencies; and explains the benefits of being accountable to project beneficiary communities.

- **Internal control:** This section explains how the four-actions model of internal control protects projects against the risk of losses due to errors, theft or fraud; explains how to use procedures and practices from each of the categories of the four-actions internal control model; defines corruption and list illicit actions that contribute to corrupt practice; how to identify warning signs of potential fraud in your projects; and how to employ strategies to counter bribery in project implementation.

An Internationally-recognised qualification for Finance DPro is available:

- *Finance DPro Foundation certificate* is an open-book online examination consisting of **75 multiple choice** questions. The pass mark is **65%** – or **49 correct answers**. An incorrect answer does not lose you marks.

More information about the exams and how to register is available at www.pm4ngos.org together with a list of training partners. There's also a website at <https://fmdprostarter.org> with videos and tools to get you started in your learning. There's also a Quick Guide to Finance DPro at <https://www.pm4ngos.org/quick-guides/>.

CHAPTER 5. MEAL DPRO

All people working in the international relief and development sectors need to understand MEAL - Monitoring, Evaluation, Accountability and Learning. The Guide to the MEAL DPro helps teams design, plan and implement monitoring, evaluation, accountability and learning (MEAL) in their projects by providing clear, practical guidance and tools for project team members that can immediately be applied. The Guide will also help MEAL officers who may be new to the sector or new to the job. As a project manager or project team member, you will collaborate with MEAL technical specialists to ensure that your systems are strong and that your MEAL data are timely and accurate. Remember that **strong MEAL is critical to project success**.

MEAL is made up of four unique elements:

M - Monitoring: The continual and systematic collection of data to provide information about project progress.

E - Evaluation: The user-focused, systematic assessment of the design, implementation and results of an ongoing or completed project.

A - Accountability: A commitment to balance and respond to the needs of all stakeholders (including project participants, donors, partners and the organization itself) in the activities of the project.

L - Learning: Having a culture and processes in place that enable intentional reflection. The aim of learning is to make smarter decisions.

MEAL activities in projects are organized into **five phases**:

- ✓ **Designing logic models:** The first phase of the MEAL cycle involves designing logic models - theory of change, results framework and Logical Framework - that show how the desired change will happen. These models establish the strong foundations of MEAL because they explain the change the project is seeking to achieve, the steps through which change will occur, and how change will be measured.
- ✓ **Planning MEAL activities:** Working from the foundations of MEAL established in the logic models, you will need to develop more detailed and comprehensive plans for MEAL, aligned with the larger project plan. A number of tools are described to help you plan for MEAL.
- ✓ **Collecting MEAL data:** Once MEAL planning is complete, you will need to develop and use tools to collect high-quality data that measure progress, and help you make decisions and learn in a timely manner.
- ✓ **Analyzing MEAL data:** Data analysis is conducted during and after project implementation according to the analysis plans established during the MEAL planning phase.
- ✓ **Using MEAL data:** To be of value, MEAL data need to be used internally to inform management decisions, and externally to inform communications and promote accountability.

Together, the five phases of MEAL form a loop that promotes continual, intentional accountability and learning. Your project should use MEAL data to periodically revisit the logic, design and implementation of the project and its MEAL system. Furthermore, based on your learning, you should update the original project design and adjust the MEAL system accordingly, if needed.

There are two cross-cutting themes that should be integrated into the design, development and implementation of MEAL activities:

- *Participation* of stakeholders to ensure that MEAL findings are relevant to the local context and to improve communication, understanding and participation. It can also increase low-level capacity in MEAL and promote a more efficient allocation of resources.
- *Critical thinking* is a process of thinking that is clear, rational, open to different opinions and informed by evidence. It helps to reduce the risk of bias and improve the quality of project data.

An Internationally-recognised qualification for MEAL DPro is available:

- *MEAL DPro Foundation certificate* is an open-book online examination consisting of **75 multiple choice** questions. The pass mark is **65%** – or **49 correct answers**. There is no ‘negative’ marking so an incorrect answer does not lose you marks.

More information about the exams and how to register is available at www.pm4ngos.org together with a list of training partners. There’s also a website at <https://mealdprostarter.org> with videos and tools to get you started in your learning. There’s also a Quick Guide to MEAL DPro at <https://www.pm4ngos.org/quick-guides/>.

SECTION 6. BRINGING IT ALL TOGETHER

We hope you now have a good understanding of the Development Professional (DPro) family and how it all fits together. The individual family Guides are available in multiple languages and are downloadable for free from the PM4NGOs website at <https://www.pm4ngos.org/>.

Get a certification

Self-study or find a trainer: Find your DPro course by visiting our Training Partners profiles at <https://www.pm4ngos.org/training-partners-directory/>.

Exams: You can book an exam through the PM4NGOs website <https://www.pm4ngos.org/> or arrange it through your organization or training partner. There are trial exams for you to try on our website.

Badges: PM4NGOs issues digital badges to successful candidates which are secure, digital representations of professional development credentials. Digital Badges are standard, verifiable, portable, and shareable digital micro-credentials with embedded information about the skills and achievements of their recipients. See <https://www.pm4ngos.org/resources/badges-request/> for more information.

Get support

Join a Hub: PM4NGOs Hubs are DPro subject matter experts (volunteers) who represent PM4NGOs in specific country or region, providing support to learners and practitioners around the world. A PM4NGOs Hub contributes to the development of professional standards that shape the future of the profession by sharing the experience and feedback from local organizations, professionals, universities, and students, helping professionals and students build experience and grow their careers through the development of local activities and events, and leading the production of contextualized materials. See <https://www.pm4ngos.org/pm4ngos-hubs/> for more information.

Join the DPro+ community: You have studied the Guide, passed the Foundation exam, and have got your certificate. What next?

In today's competitive environment, successful development professionals need to continually evolve by building on their qualifications. The DPro+ website is here to help you do just that. Register to get ongoing self-learning opportunities and unique curated content for continuing professional development. Visit the 'Courses' section to see the free training available to help members improve their skills.

DPro+ is also the site where certified DPro professionals can meet to connect with each other to share experience and learn about job and mentoring opportunities. There are forums with postings from people in the humanitarian and development sectors, and links to regular PM4NGOs webinars and activities. See <https://www.pm4ngos.org/pmd-pro-plus-live/> for more information.