

UNIVERSIDAD PARA LA COOPERACIÓN INTERNACIONAL
(UCI)

THE PROPOSAL OF A METHODOLOGY FOR PROJECT MANAGEMENT FOR
THE SWORD OF THE SPIRIT INTERNATIONAL EXECUTIVE COUNCIL

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DEDICATION

This project is dedicated first of all to God, who created and inspired the Sword of the Spirit and gave them a calling and a purpose. To the IEC, who have been a faithful employer for many years. To my family and friends who have supported me throughout this endeavor.

ACKNOWLEDGMENTS

Thanks to all those who, in one way or another, have provided greatly appreciated information, support and assistance in developing this project.

ABSTRACT

The objective of this paper is to create a proposal for a project management methodology for the International Executive Council of the Sword of the Spirit that will optimize the project performance of the organization. The absence of a formal structure to manage projects means these are often delayed or abandoned. The IEC is keen to be more efficient in project management, and they acknowledge that some cultural change needs to take place in order to achieve this.

The main product to be delivered by this project is a proposal of a methodology for project management that takes into account an assessment of the current status, as well as a new standardized set of processes and templates accompanied by one current project in which the proposed methodology is applied. This will be developed by conducting email and online interviews with the appropriate stakeholders and analyzing the data together with secondary sources, mainly the Project Management Body of Knowledge produced by the Project Management Institute.

More details on the results and recommendations are to follow once the project is executed in the next phase of the FGP.

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ABBREVIATIONS AND ACRONYMS

FGP: Final Graduation Project

GSPM: Global School of Project Management

IEC: International Executive Council

IES: International Executive Secretary

NGO: Non-Governmental Organization

PMBOK: Project Management Body of Knowledge

PMI: Project Management Institute

PMM: Project Management Methodology

SOS: The Sword of the Spirit

SWOT: Strengths, Weaknesses, Opportunities and Threats

UCI: Universidad para la Cooperación Internacional

WBS: Work Breakdown Structure

EXECUTIVE SUMMARY

In order for projects to be effectively managed, a formal structure and a clear methodology are necessary. The lack of such structure can cause projects to be delayed or even abandoned. Many organizations, like the International Executive Council, have attempted various ways of managing their projects but never a formal project management methodology that was tailored specifically for their way of work.

The IEC is currently seeking to enhance their productivity and their efficiency in managing their projects. The purpose of this document is to develop a proposal of a methodology that will enhance the IEC's workflow in managing projects.

The general objective of this final graduation project is to propose a methodology for project management for the Sword of the Spirit International Executive Council that will optimize the project performance for the organization. The specific objectives are to identify the areas where the organization needs improvement as a way to determine the main elements of the project management methodology, to develop a standard for project development that can be easily adopted by the organization, to create the project management processes flow charts and descriptions of the proposed methodology to ensure that it is well understood and implemented, to design project document templates that will serve to apply the standard, and to provide an example case to highlight the benefits of the proposed methodology.

The methodology for this project was a combination of knowledge gathered directly from the IEC members via email and online interviews, with the analytical review and application of secondary sources such as the PMBOK developed by the Project Management Institute.

The best practices for Project Management that are mentioned in the literature were compared to the information provided by the IEC members as a way to tailor the best possible methodology for the organization.

During the development of the project, it was clear that the organization's expectation of the methodology did not comply with the minimum requirements for a project management methodology that is helpful for running successful projects in an organized way. An analysis was done of the IEC expectations, and criteria were developed for the methodology. These criteria were organized into the phases of the project and the methodology began to take form.

This was followed by the development of templates for all the project documents and a brief description of how each document is applied to the

methodology as a guide for the end users. Finally, a case study was developed applying the methodology to an old project to exemplify how the methodology could be applied to a real-life project in the organization.

It was concluded that the Sword of the Spirit needs a formal approach to managing their projects, and that a simple methodology would be a good starting point for them as an organization. It was necessary to perform some tailoring on the methodology in order to fit the needs and requirements of the organization.

Another conclusion is that while project planning takes time, it is also valuable because it reduces the amount of work in the executing phase. This highlights the value of project integration.

The overall recommendation flowing from this final graduation project is that every organization needs a project management methodology. Particularly, the Sword of the Spirit needs a simple but formal methodology, and they need to regularly evaluate their projects in order to make adjustments to such methodology. It is recommended that the IEC members go through some training sessions in order to understand the importance of project management, as well as to learn the workflow they will need to follow when applying the methodology.

1 INTRODUCTION

1.1. Background

The Sword of the Spirit is an international ecumenical community of communities. It is part of the covenant communities' movement within the Charismatic Renewal. It currently has ninety-four (94) member communities in twenty-nine (29) countries around the world. With more than fourteen thousand (14,000) members, it is a small group when compared to the overall number of Christians around the world, reaching to less than 1% of the Christian population according to the Religious Composition by Country, 2010-2050.

According to the Sword of the Spirit's website, "the International Executive Council (IEC), led by the President of the Sword of the Spirit, is the leadership team that maintains and moves forward their common life and work. It is an executive body in that it directs the work the Sword of the Spirit does on the international level. It also makes executive policy for their common life and work on the regional and international levels, and coordinates that work". The IEC is tasked to develop projects and to create policies. The eight (8) IEC members perform their work as volunteers and they meet three (3) times a year as an international group, for about 1 week of meetings, decision making and general work.

The IEC manages more than twenty-five (25) projects every year, distributed between the eight (8) IEC members. However, the IEC does not have a common approach to do this work, nor are there any standards or templates to be followed in carrying it out.

It is expected that applying a formal project management methodology would enhance the work of the IEC and, therefore, the global mission of the Sword of the Spirit.

1.2. Statement of the problem

The lack of a formal structure to manage these projects means these often get delayed or even abandoned. Therefore, the IEC is keen on allocating time and resources to finding more efficient ways of managing their projects to move the organization forward.

The International Executive Secretary has confirmed this by saying that the IEC members are not used to doing their work in a formal or structured way in which they need to be accountable to someone else in terms of time and resources. A spreadsheet model was attempted in the past, but it failed. Its failure was attributed to the lack of a project management culture, as well as an organizational culture that does not deal well with deadlines, accountability, resources allocation, etc. This occurs mainly because the work is carried out by volunteers in their free time.

The IEC has commissioned a proposal for a Project Management Methodology that will be tailored to their organization. This Final Graduation Project intends to seize the opportunity opened by the IEC as a way to improve their methodology and help them yield more effective results.

There is the expectation that a tailored Project Management Methodology that the IEC can easily adopt will optimize the project management processes that need to be implemented as well as the necessary culture changes in the organization, finding a balance that will be helpful for all.

Such a methodology will make project development and management more efficient. Furthermore, it will make better use of the currently allocated resources. It is estimated that there will be a learning curve, but once it is passed, the time management of projects will be more effective.

1.3. Purpose

The overall aim of this project is to develop a proposal of a methodology for project management that will be used by the IEC to work in a more efficient manner, that is easier to follow up and that can be replicated in future projects or in other levels of the organization.

According to an interview with Richard Perry (2021), the International Executive Secretary, the IEC manages the international aspect of the Sword of the Spirit, and therefore their main jurisdiction is based upon the 7 elements of the so-called Irreducible Common Nucleus, namely “Our call and identity”, “Our covenant commitment”, “Our way of life”, “Community care”, “Our mission”, “Our government” and “Intercommunity relationships”. The IEC is also responsible for some other projects and administrative work.

The scope of these projects is very broad, since it reaches many areas of the life and mission of the Sword of the Spirit. They can involve running events and assemblies, communicating and imparting vision on important topics, ensuring all communities comply with the international provisions for their constitution, reviewing internal processes, reviewing teaching materials, developing pastoral plans, promoting mission objectives, fundraising for the mission efforts, creating strategies and priorities, digitizing paper records, and many more. The IEC also maintains an operative portfolio of ongoing tasks.

There is a document titled *IEC Action Plan* which lists these projects and the ongoing tasks, assigning a priority and a person responsible. This document has served as the main project management tool up to this point, so the current project intends to develop it further, formalize it and standardize it as a part of a new project management methodology. The adoption of a project management methodology will be applied to the projects and not to the ongoing tasks.

It is crucial for the sake of the project that the IEC representatives cooperate in providing information as well as in offering their input about the proposed methodology. If this takes place as expected, it will be possible to deliver a proposal of a methodology that is tailored to the organization's particular way of working and that is usable by the stakeholders who will be managing the projects.

1.4. General objective

To propose a Project Management Methodology for the Sword of the Spirit International Executive Council that will optimize project performance for the organization.

1.5. Specific objectives

1. To identify the areas where the organization needs improvement, as a way to determine the main elements of the Project Management Methodology.
2. To create the Project Management flow charts and descriptions of processes of the proposed methodology to ensure that it is well understood and implemented.
3. To design project document templates that will serve to apply the standard.
4. To provide an example case to highlight the benefits of the proposed methodology.

2 THEORETICAL FRAMEWORK

2.1 Company/Enterprise framework

The organization that will be described is the Sword of the Spirit. However, the current project is applied to the International Executive Council, which is one of the Sword of the Spirit's governmental bodies.

The IEC has its own particular culture, its way of working, its frequency of meetings and its established agenda. The development of a project management methodology does not intend to change that, but only to improve the areas that could work better to make project development more efficient.

2.1.1 Company/Enterprise background

The Sword of the Spirit is a network of Christian communities and movements around the world that “*have a common vision, way of life and spiritual culture*” (The Sword of the Spirit Website, 2020).

They describe themselves as a “community of communities” with members who belong to various churches – Protestant, Catholic, Orthodox.

According to the Sword of the Spirit Website (2020), “The Sword of the Spirit is a federation of self-governing local communities. When the local communities enter into the covenant of membership, they enter into the international community of communities. The international leadership, therefore, has the primary responsibility to unite us and move us forward as a community of communities.”

This Project will focus on the International Executive Council, which is one of the international governing bodies of the Sword of the Spirit. Its task is to look after the international level of life and mission of the Sword of the Spirit communities.

2.1.2 Mission and vision statements

The Sword of the Spirit Mission and Vision Statements are found in the Sword of the Spirit official website, in the “About Us” and the “Our Call” pages.

Our mission: “We are called to live, work and strive, by the power of the Holy Spirit, so that others might have true life in Christ, now and forever.” (The Sword of the Spirit, 2020)

Our vision: “In every age the Lord calls men and women to follow him, to put aside concern for their own lives, and, trusting fully in his grace, to give themselves generously in his service. We have heard the call of God, a call to serve him and his people in this time, a time of trial and challenge for the Christian people, a time when he is pouring out his Spirit to renew, restore and unify his people. He has addressed us as ‘The Sword of the Spirit’, a name signifying our role as a missionary body witnessing to and proclaiming the word of God in this age of spiritual warfare. In response to this call, we have formed an international ecumenical association so that we might more effectively come together from many nations, cultures and Christian traditions. We are to be covenanted to Himself and one another in local communities and in an international community of

communities so that we might fulfill the mission he has given us.” (The Sword of the Spirit, 2020)

2.1.3 Organizational structure

The International Executive Council is designated and has its authority given by the International Assembly, which is the highest international government body in the Sword of the Spirit.

The basic structure of the international government is depicted in Figure 1. The Sword of the Spirit international is structured this way (Source compiled by author):



Figure 1 Organizational structure of the SOS (Source: Own development)

The International Assembly is the highest leadership body of the Sword of the Spirit.

The IEC maintains and moves forward the common life and work by directing the work done on the international level. It is responsible to maintain the unity of the Sword of the Spirit and the unity between itself and the Assembly. The IEC is accountable to the International Assembly. It also relates to the four **Regional Councils** (which, in turn, are above the **Zonal Councils** in two of the regions). Regional and Zonal Councils gather the overall leaders from each community's **Local Council** in representation of all the **Local Community Members**.

These relationships work both ways. They often operate top-to-bottom when the Assembly decides something, it is then implemented by the IEC and the councils are instructed to apply it. Other times they work bottom-to-top when a local community, a zone or a region proposes something that is then submitted to and finally approved by the International Assembly.

The IEC also oversees the **Standing Committees** which are responsible for specific areas of the life of the Sword of the Spirit such as teaching, worship, community building and others.

2.1.4 Products offered

The Sword of the Spirit is a non-profit organization called to be, in the entity's own words, "a community of disciples on mission."

The main service offered by the Sword of the Spirit is evangelization, Christian formation, events & conferences, leadership training, community building and ecumenical witness.

Some side products are in the creative field such as books, music, paintings, sculptures and poetry, or in the area of Christian social action.

2.2 Project Management concepts

2.2.1 Project

The Merriam-Webster Dictionary defines a project as “a specific plan or design”. The PMBOK Guide defines a project as “a temporary endeavor undertaken to create a unique product, service, or result” (Project Management Institute, 2017, p.4).

For the purposes of this Final Graduation Project, a project is understood as the development of a proposal of a Project Management Methodology to be used by the International Executive Council of the Sword of the Spirit.

2.2.2 Project management

The PMBOK Guide defines project management as “the application of knowledge, skills, tools and techniques to project activities to meet the project requirements” (Project Management Institute, 2017, p.10). Abyad (2018) refers to it as “the business process of creating a unique product, service or result.”

As cited by Radujković & Sjekavica (2017) “project management is planning, organization, monitoring and control of all aspects of a project, with motivation of all included to achieve project goals on a safe manner, within agreed schedule, budget and performance criteria”.

For the IEC and the Sword of the Spirit, project management is a set of tools intended to help in the effective development of projects from conception to delivery to evaluation.

2.2.3 Project life cycle

The project life cycle is “the series of phases that a project passes through from its start to its completion” (Project Management Institute, 2017). These phases are opened and closed according to specified criteria.

Association for Project Management (2012) as cited by Kostalova & Tetreanova (2016) says that “PRINCE 2 divides the project life cycle into five successive stages as follows: concept, definition, implementation, handover and closeout”. PMBOK Guide by the Project Management Institute (2017) defines the life cycle in only four phases:

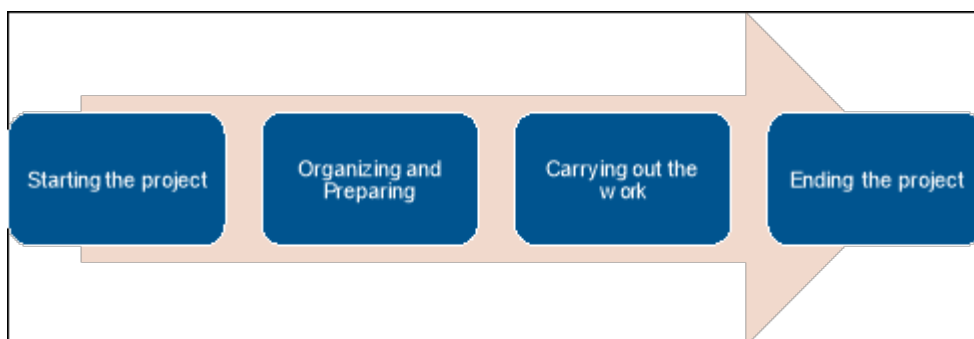


Figure 2 Project Life Cycle Phases (Source: Own development)

In the current project, the life cycle will be described and established for the project methodology using PMBOK Guide's stages as shown in Figure 2. Projects in the Sword of the Spirit will start, get organized, be implemented and finish.

2.2.4 Project management processes

“The project life cycle is managed by executing a series of project management activities known as project management processes” (Project Management Institute, 2017). These processes follow a flow in which the output of one process becomes the input of another or a finished deliverable.

Abyad (2018) describes the 5 process groups that come in PMBOK Guide by saying that initiating is when the project is set up and the scope is identified and the team found; planning is when the resources, timelines and milestones, as well as the budget, risk management, etc. are developed; executing is when the project team undertakes the project activities; controlling and monitoring ensures that everything is going according to plan; and closing makes sure that everything is delivered as expected.

These processes can be chronological, but not necessarily so. Some process groups will be executed throughout the life cycle of the project.

In PMBOK Guide's methodology, processes are shown in flow charts (see figure 3). This Final Graduation Project will design the process flow charts for the proposed Project Management Methodology for the IEC.

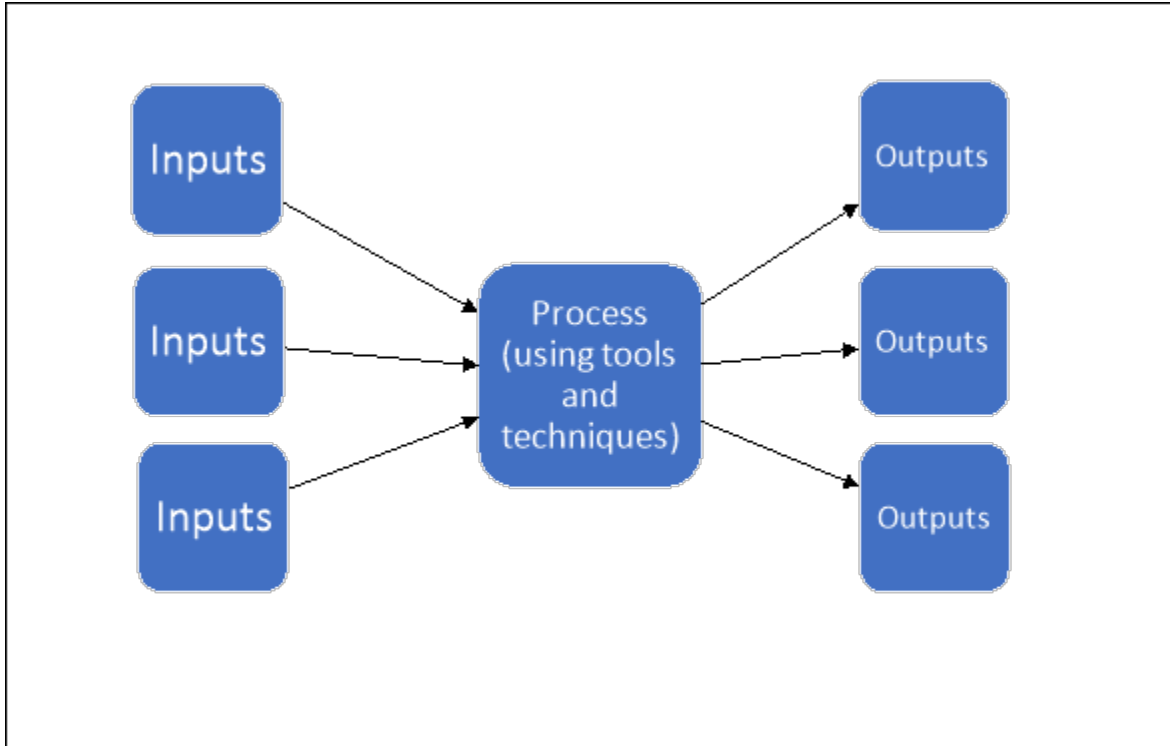


Figure 3 Example of a flow diagram (Source: Own development)

2.2.5 Project management knowledge areas

The Project Management Knowledge areas are fields or areas of specialization that are commonly employed when managing projects (Project Management Institute, 2017). The PMBOK Guide defines 10 knowledge areas that are involved in the planning and execution of projects.

In the development of a project management methodology, the Project Management Knowledge Areas will be used as components of the methodology to ensure that all aspects of the project are integrated; that the project's scope is well defined and that it stays that way; that time and cost are managed well; that the deliverables comply with quality requirements; that resources, risks, procurement

and stakeholders are managed adequately; and that there is clear communication between all the stakeholders throughout the project.

2.2.5.1. Project Integration Management

Project Management Institute's PMBOK Guide (2017) describes this as the processes and activities to identify, define, combine, unify and coordinate the various processes and project management activities within the Project Management Process Groups.

In this project, integration will be mainly performed by the project manager, who, working in close contact with the IEC members, will ensure that all the processes are well coordinated throughout the project life cycle.

2.2.5.2. Project Scope Management

Project Management Institute's PMBOK Guide (2017) describes this as the processes required to ensure that the project includes all the work required, and only the work required, to complete the project successfully.

The scope of each IEC project is very variable—it can vary from very practical to very technical to even very abstract deliverables and objectives. Managing the scope of every project will ensure that no extra work is done and also that nothing is missing from the initial expectations.

2.2.5.3. Project Schedule Management

Project Management Institute's PMBOK Guide (2017) says that Project Schedule Management includes the processes required to manage the timely completion of the project.

Given the organizational nature of the IEC, most projects tend to have a very long and slow-paced life cycle. The project management methodology does not intend to make projects faster, but only to make them follow the planned schedule.

2.2.5.4. Project Cost Management

According to Project Management Institute's PMBOK Guide (2017), this area of knowledge includes the processes involved in planning, estimating, budgeting, financing, funding, managing and controlling costs so that the project can be completed within the approved budget.

The IEC often works with a centralized budget, and budget approval is usually simple. Work will be performed to achieve greater effectiveness in areas like estimating and planning, which are possibly the weaker links in the process.

2.2.5.5. Project Quality Management

This area includes the organization's quality policy regarding planning, managing and controlling project and product quality requirements in order to meet the stakeholders' expectations. (Project Management Institute, 2017)

In the Sword of the Spirit there can be many stakeholders, and therefore many expectations. Establishing a standard for processes in order to ensure a certain quality will be a major improvement for the overall organization.

2.2.5.6. Project Resource Management

This area refers mainly to human resources. It is defined by Project Management Institute's PMBOK Guide (2017) as the process to identify, acquire, and manage the resources needed for the successful completion of the project.

The universe of resources available in the Sword of the Spirit is very broad and very impressive. There are numerous experts in many fields who excel in their jobs. Being able to identify, acquire and manage these resources will make the IEC projects significantly more efficient.

2.2.5.7. Project Communications Management

Project Management Institute's PMBOK Guide (2017) states that this area includes the processes required to ensure timely and appropriate planning, collection, creation, distribution, storage, retrieval, management, control, monitoring and ultimate disposition of project information.

This will be one of the largest elements of the methodology, since project communications are vital for all the other knowledge areas. Many tools will be designed as aids for the project teams to effectively communicate with the various stakeholders.

2.2.5.8. Project Risk Management

Risk management, planning, identification, analysis, response planning, response implementation and monitoring of risks in a project are the processes mentioned in the PMBOK Guide for this knowledge area. (Project Management Institute, 2017)

This project will not undertake a standardization of the risk management processes, nor will they be included in the project management methodology since there are different tools used in the organization and they are often not comprehensive.

2.2.5.9. Project Procurement Management

Project Procurement Management includes the processes necessary to purchase or acquire goods, services, or results needed from outside the project team. (Project Management Institute, 2017)

In a way similar to resources management, procurement for IEC projects can benefit greatly from the nature of the organization. Given its international and multi-cultural membership, the range of available goods and services is very broad, and this can lead to very fruitful projects. However, this area will not be included in the project management plan since the IEC has a very limited scope in their projects which can be achieved with very little procurement.

2.2.5.10. Project Stakeholder Management

The processes in this knowledge area include the ones required to identify the people, groups or organizations that could impact or be impacted by the project. (Project Management Institute, 2017)

This will be another one of the largely developed elements in the methodology. There is yet a lot to be done in the Sword of the Spirit in terms of stakeholder management. By implementing tools and templates to apply

this for every project, it will be much clearer what is to be expected from each stakeholder and what stakeholders are expecting from each other.

2.3 Other applicable theory/concepts related to the project topic and context

2.3.1 Project Management Methodologies

To quote Chandrachoodan & Radhika (2020), “selecting the right project management methodology is as important as executing a project.” The importance of selecting the right project management methodology and tailoring it specifically for the IEC is one of the main goals of this research. Therefore, a definition and analysis of various methodologies will be developed.

Charvat (2003) defines methodology as a “set of guidelines or principles that can be tailored and applied to specific situations,” as cited by Karaman & Kurt (2015). The concept of tailoring will be explained further in the next section.

Karaman & Kurt (2015) suggest a few characteristics that can be useful in selecting a methodology. The methodology’s approach, activities, management style, focus, techniques and skills can determine whether it will be more or less useful for its intended use.

Jovanovic & Berić (2018) list the available Project Management Methodologies in their paper. This project will consider the approach from three of them only:

- **PMI:** it is displayed in the PMBOK Guide and is developed by the Project Management Institute. Comprising 10 knowledge areas, 5 process groups and 49 processes, it is “suitable to be implemented in any kinds of projects.” (Jovanovic & Berić, 2018)
- **PRINCE2:** Developed in the United Kingdom and originally intended for IT projects, PRINCE2 is a methodology with 9 basic elements and 8 basic subprocesses.
- **Agile:** As described by Jovanovic & Berić (2018), “Agile approaches were developed as a response to evident differences among certain kind of projects, especially to the specificities of the IT Projects.”

The chart below, by Jovanovic & Berić (2018), compares traditional (PMI, PRINCE2, etc.) with Agile methodologies.

Chart 1 Information sources (Jovanovic & Berić, 2018)

| Traditional methodologies: | Agile methodologies: |
|---|--------------------------------------|
| Permanent process | Sequential process |
| Firm project structure | Project structure subject to change |
| Project documentation is precise and detailed | Project documentation is provisional |

| Traditional methodologies: | Agile methodologies: |
|---|---|
| Project execution technology is clearly defined and most often changing | Project execution technology is subject to change |
| Possible changes | Permanent changes |
| Rare meetings with client | Regular meetings with the client |
| Multifunctional team | Self-organized team |
| High authority of project manager | Not so high authority of the manager |

Given that the IEC currently has no formal structure of project management, the project methodology will have to start from scratch. This is a valuable opportunity to explore the best features of various methodologies and tailor them into the Sword of the Spirit Project Management Methodology.

2.3.2 Tailoring

In the development of a Project Management Methodology there needs to be a certain number of standardized processes, but there is also a need to select the ones that are more adequate for the project. It is this adaptation of the current methodologies that is called tailoring.

Project Management Institute's PMBOK Guide (2017) says that "tailoring is necessary because each project is unique;" in the case of developing a methodology for an organization, tailoring is necessary because each organization

is unique. There are differences in the organization's corporate culture which will determine how the projects will be handled.

McClure (2019) concluded that in order for an organization to select a project management methodology for tailoring, it is important to decide which advantages they want to achieve with their projects.

Given the nature of the IEC's projects, there will be a fair amount of tailoring done in each project. This will be allowed by the methodology. But even further, the methodology itself will intend to be tailored specifically for the IEC's way of working and their type of projects.

2.3.3 Non-Profit Organizations

The Merriam-Webster Dictionary defines profit as "the excess of the selling price of goods over their cost". Therefore, an organization that intends no profit could be one that produces goods and offers them at cost, generating no excess. This means that these organizations' primary objective is to produce a good, but not to make anything out of it. It doesn't mean that their projects will not generate resources, but that these resources are used to cover the cost of producing them.

As mentioned by Oliveira, et al. (2021), non-profit organizations (NPO) have an important role in responding to solve the needs of social responses as well as fill in the gaps left by the government and the private sector. NPOs have, therefore, a unique approach to

management which can include various elements from governmental and private organizations as well as some elements that are inherent to themselves.

3 METHODOLOGICAL FRAMEWORK

3.1 Information sources

The Merriam-Webster Dictionary states that information is the knowledge obtained from investigation, study or instruction. A source, in turn, is the point of origin or procurement of that knowledge.

Varshney (2011) says that information sources can be observation, people, speeches, pictures, organizations, documents and other.

3.1.1 Primary sources

A primary source is the most direct access to knowledge that the researcher can find. "Primary sources as distinguished from secondary sources which cite, comment on or build upon primary sources" (Varshney, 2011).

The primary information sources for this Final Graduation Projects are

- International Executive Council documents
- Sword of the Spirit documents
- Interviews with IEC members.

3.1.2 Secondary sources

As stated by Varshney (2011), the secondary sources are those that compile from or refer to the primary sources.

The secondary sources of information for this Final Graduation Project are:

- PMBOK Guide 6th Edition

- Research about Project Management Methodology
- Research about Project Management

Chart 2 Information sources (Source: Own development)

| Objectives | Information sources | |
|--|---|---|
| | Primary | Secondary |
| To identify the areas where the organization needs improvement as a way to determine the main elements of the Project Management Methodology. | IEC Documents Sword of the Spirit Documents Interviews with IEC members | PMBOK Guide Research about PM Methodology Research about Project Management |
| To create the Project Management flow charts and descriptions of processes of the proposed methodology to ensure that it is well understood and implemented. | IEC Documents Sword of the Spirit Documents Interviews with IEC members | PMBOK Guide Research about PM Methodology Research about Project Management |
| To design project | IEC Documents | PMBOK Guide |

| Objectives | Information sources | |
|---|--|--|
| document templates that will serve to apply the standard. | Sword of the Spirit Documents Interviews with IEC members | Research about PM Methodology Research about Project Management |
| To provide an example case to highlight the benefits of the proposed methodology. | IEC Documents Sword of the Spirit Documents Interviews with IEC members | PMBOK Guide Research about PM Methodology Research about Project Management |

3.2 Research methods

The Merriam-Webster Dictionary defines research as “the collecting of information about a particular subject” and a method as “a systematic procedure, technique, or mode of inquiry employed by or proper to a particular discipline”. Therefore, a research method could be defined as the systematic procedure or technique in which the information about a particular subject is collected.

Queirós, Faria & Almeida (2017) conclude that research methods allow and facilitate scientific studies by giving the researcher a methodology with which to analyze data.

The research methods that will be used in this project are the Secondary Data Analysis method and the Email/Online Interviews method which are described below, in order to obtain qualitative data that will enable the formulation of a project management methodology for the IEC.

3.2.1 Secondary Data Analysis

Melissa Johnston (2014) states that Secondary data analysis is the study and application of data that was put together by another researcher for their own primary purpose.

In this project, secondary data analysis will rely on research done by individuals or institutions that have developed methodologies for project management, in order to determine the best practices and the most suitable methodology for the IEC.

3.2.2 Email and Online Interviews

As stated by Hawkins (2018), interviews are the most popular research method for qualitative research, and these have evolved in the latest years with all the access to technology.

This project will make use of email and videoconference interviews to gather information from the IEC members.

Chart 3 Research methods (Source: Own development)

| Objectives | Research methods | |
|--|---|---|
| | Secondary Data Analysis | Email / Online Interviews |
| To identify the areas where the organization needs improvement, as a way to determine the main elements of the Project Management Methodology. | This method is applied by comparing the practices of the organization with those referred to by individuals or organizations with previous experience in developing a project management methodology. | This method is used to gather knowledge on how the organization performs their projects and determine their needs and requirements. |
| To create the Project Management flow charts and descriptions of processes of the proposed methodology to ensure that it is well understood and implemented. | This method is used to reference other standards that can be a guide for the best practices that will be applied to the flow charts and descriptions of the IEC Project. Management Methodology. | This method is used to assess and monitor the IEC's understanding and acceptance of the proposed processes. |

| Objectives | Research methods | |
|--|---|---|
| To design project document templates that will serve to apply the standard. | This method is used to reference templates from other sources that could provide elements for the design of the IEC Project Management Methodology. | This method is used to keep the IEC's point of view about the templates so that they will be well received. |
| To provide an example case in order to highlight the benefits of the proposed methodology. | This method is used to develop the framework in which the methodology is designed. | This method is used to assess and monitor the IEC's acceptance and approval of the methodology. |

3.3 Tools

Tools are described in the Project Management Institute's PMBOK Guide (2017) as something concrete that can be used to perform an activity that will produce a result or a deliverable.

In order to develop a proposal for a Project Management Methodology for the IEC the tools that will be used are Interviews, Historical Information Review, Cost-Benefit Analysis, Influence diagrams, Expert Judgment, SWOT analysis, Flowcharts, Matrix diagrams and analogous/parametric estimating.

Chart 4 Tools (Source: Own development)

| Objectives | Tools |
|--|--|
| To identify the areas where the organization needs improvement, as a way to determine the main elements of the Project Management Methodology. | Interviews, Historical Information Review, Cost-Benefit Analysis, SWOT Analysis, Expert Judgment. |
| To create the Project Management flow charts and descriptions of processes of the proposed methodology to ensure that it is well understood and implemented. | Interviews, Influence Diagrams, Flowcharts, Matrix Diagrams, Expert Judgment. |
| To design project document templates that will serve to apply the standard. | Interviews, Flowcharts, Matrix diagrams, Expert Judgment. |
| To provide an example case to highlight the benefits of the proposed methodology. | Interviews, Cost-Benefit Analysis, Influence Diagrams, SWOT Analysis, Flowcharts, Matrix Diagrams, Expert Judgment, and Analogous/Parametric Estimating. |

3.4 Assumptions and constraints

An assumption is something that can be considered true without needing any proof, and a constraint is something that limits the execution of a project. (Project Management Institute, 2017)

Some examples of assumptions are that the IEC is interested in receiving the proposal and considering its implementation, that there is enough information available and that at least one IEC member can provide support throughout the development of the proposal.

The main constraint for this project is the time factor, since there are only three months for its execution, but another constraint is the confidentiality of some of the documents which will limit the way the project is conducted.

Chart 5 Assumptions and constraints (Source: Own development)

| Objectives | Assumptions | Constraints |
|--|---|---|
| To identify the areas where the organization needs improvement, as a way to determine the main elements of the Project Management Methodology. | The IEC is interested in receiving the proposal and considering its implementation. There is enough information available. At least one IEC member can provide support throughout the | Time: the project needs to be implemented in three months. Confidentiality: the documentation needed will be available and for use during the project. |

| Objectives | Assumptions | Constraints |
|--|---|--|
| | development of the proposal. | |
| To create the Project Management flow charts and descriptions of processes of the proposed methodology to ensure that it is well understood and implemented. | <p>The IEC is interested in receiving the proposal and considering its implementation.</p> <p>There is enough information available.</p> <p>At least one IEC member can provide support throughout the development of the proposal.</p> | <p>Time: the project needs to be implemented in three months.</p> <p>Confidentiality: the documentation needed will be available and for use during the project.</p> |
| To design project document templates that will serve to apply the standard. | <p>The IEC is interested in receiving the proposal and considering its implementation.</p> <p>There is enough information available.</p> <p>At least one IEC member</p> | <p>Time: the project needs to be implemented in three months.</p> <p>Confidentiality: the documentation needed will be available and for use during the project.</p> |

| Objectives | Assumptions | Constraints |
|---|--|--|
| | can provide support throughout the development of the proposal. | |
| To provide an example case to highlight the benefits of the proposed methodology. | The IEC is interested in receiving the proposal and considering its implementation. There is enough information available. At least one IEC member can provide support throughout the development of the proposal. | Time: the project needs to be implemented in three months. Confidentiality: the documentation needed will be available and for use during the project. |

3.5 Deliverables

The Project Management Institute (2017) defines a deliverable as “any unique and verifiable product, result or capability to perform a service that is required to complete a process, phase or project.”

This Final Graduation Project will develop the following deliverables:

- a report on the current status of project management in the organization and current needs,
- flowcharts and descriptions of the methodology's processes,
- a set of standardized templates to apply the methodology
- and one case-study applying the methodology.

Chart 6 Deliverables (Source: Own development)

| Objectives | Deliverables |
|--|---|
| To identify the areas where the organization needs improvement, as a way to determine the main elements of the Project Management Methodology. | A report on the current status of project management in the organization and current needs. |
| To create the Project Management flow charts and descriptions of processes of the proposed methodology to ensure that it is well understood and implemented. | Flow Charts and Descriptions of the methodology processes. |
| To design project document templates that will serve to apply the standard. | A set of standardized templates to apply the methodology. |
| To provide an example case to highlight the benefits of the proposed methodology. | A case-study applying the methodology. |

4 RESULTS

This chapter displays the development of the project objectives. In order to carry out the project, ongoing communication was held with the IEC delegate who provided assistance and guidance to produce the knowledge required for the development of a project management methodology that is called “SOS Project Management Methodology.”

The first result is the assessment of the project management areas that need to be improved in the organization. Then the proposal of the “SOS Project Management Methodology” is stated, with explanations of the processes as well as with the templates that will be used to aid the project manager carry on projects using the methodology. Finally, there is a case study of the application of this methodology to an actual project if it had been developed using the “SOS Project Management Methodology.”

4.1. Areas where the organization needs improvement in Project Management

The International Executive Council of the Sword of the Spirit is a very particular type of organization. Therefore, some challenges come up when attempting to adopt a formal methodology for Project Management.

4.1.1 Email extracts and notes from conversations with the IEC delegate

In order to gather more information about the organization and to understand how to better propose a methodology for project management, the IEC appointed the International Executive Secretary to offer some principles of what the IEC is

currently doing or has done in the past regarding project management, as well as what they would like to achieve.

The following are extracts from the emails and notes taken during the online meetings with the IEC delegate.

Chart 7 Excerpts (Own development)

| Topic | Excerpt |
|--|--|
| The IEC as a project-based organization that could use a Project Management Methodology. | The IEC has a lot of projects, and for many of them assigns an IEC member to be responsible. But we don't have a common approach (which I assume is what you mean by methodology) to how we do such work, how we specify parameters, time-scales, deadlines, accountability, etc. |
| Previous experience with Project Management Methodologies or Tools | I created a spreadsheet (attached) to try to be the management tool, but it failed, partly because I didn't have time to maintain it, but mainly because we don't have a "project management" culture, nor a culture that accepts some of the key elements (like accountability, deadlines, how to allocate scarce resources). |
| Plans for Project Management in the near future | From September 2021 we are moving to a "project-based" approach – we will agree projects together and will pay for them based on hours worked. It's a simple concept, but I think will be challenging to implement. |

| Topic | Excerpt |
|--|---|
| Kind of project management methodology the organization wants. | I want a mechanism which is reasonably simple but also clear and robust. |
| Elements the IEC considers before approving a project | Scope, time-frame, cost. |
| Expectation for the methodology | It will be necessary to simplify it as much as possible to make sure it is very manageable. Most of our brothers who do work for the IEC have little experience of this kind of project management. |

4.1.2 Analysis

After two online meetings and various email exchanges with the International Executive Secretary (who was appointed by the IEC to represent them for the sake of this project) to analyze the IEC's way of working, their expectations and their openness to a change in their workflow, it was possible to determine some areas of project management that need improvement.

It is clear, from the excerpts, that the organization is lacking in project management tools and knowledge but is keen to improve their project management skills.

However, it is also very clear that they require something simple and manageable so that their volunteer members can take the methodology on board and implement it. One of the characteristics of the IEC projects is that they often involve a few people (one or two people) and are relatively simple; therefore the

methodology needs to allow for a thorough project management approach without it being overwhelming for the end users.

A list has been produced of the main elements that were identified during this process that need to be improved through the creation of the “SOS Project Management Methodology.”

4.1.2.1 The figure of a project manager: Given the IEC’s structure and functionality, all members manage their own projects, often with a small committee. The figure of a project manager is lacking. One of the main issues is the lack of accountability—each member is working on their projects without being accountable to anyone else, which makes projects very variable in terms of scope, schedule and budget.

4.1.2.2 Project Integration: IEC projects are run informally, by doing what is merely necessary and not doing any formal paperwork to attempt to integrate all the knowledge areas into the project. This results in projects that don’t yield the expected results or that fail to communicate on the results of the project. This also causes many of the PMBOK (2017) Knowledge Areas to be ignored or left out of the projects.

4.1.2.3 Change procedures: One of the main aspects that emerged from the investigation was the need to have a formal procedure for change within IEC Projects. It is necessary to state ways for IEC members to apply for a change of scope, schedule or budget (to mention a few) and have them approved.

4.1.2.4 Volunteer Culture: The IEC work is 100% voluntary, and every member of the IEC has a limited time allocation for their IEC duties.

Because every member of the team is a volunteer, they don't expect to be pressured or to be accountable. They don't expect to need to do more than is strictly required to fulfill project objectives. Many of them have plenty of experience in their full-time jobs using Project Management methodologies; however, they have the expectation that in their IEC projects they can experience less burden.

4.1.2.5 Budgeting tools: The IEC determines the budget for their own projects, which means they have flexibility and operational authority to allocate resources to each project accordingly. One of the needs that have resulted from this process is to find a way to estimate a budget before a project is approved. The current method is that they allocate an hourly rate to those working on the project and then pay that rate. There is a need for a better budgeting structure so that there can be fewer changes in project costs.

4.1.2.6 Scheduling tools: IEC projects have what they refer to as a "*ball-park*" schedule. A project is estimated to be done within the next two or three years, for example. This, together with the lack of accountability and structure from a Project Manager, results in some projects being very delayed and some even abandoned. The lack of clear scheduling also

means lack of strategic planning, since one project will quite often be the starting point for other projects.

Chart 8 summarizes the main findings regarding areas of improvement and the proposal for solving the issues found.

Chart 8: Summary of Areas of Improvement (Own development)

| Finding | Main discoveries | Proposal for solving it |
|---------------------------|---|--|
| Figure of Project Manager | The figure is missing. There is no IEC Project Manager. | Appoint a Project Manager to oversee the IEC projects and help its members implement projects. |
| Project Integration | Projects are run informally, and all the areas are not integrated. | Develop a methodology using documents to help the IEC integrate all the knowledge areas into their projects. |
| Change Procedures | There are no procedures for change in projects. | A regular meeting with the Project Manager in which the IEC delegate will be able to suggest or request changes that will then be consulted and approved by the IEC. |
| Volunteer Culture | Every member of the IEC works voluntarily and has limited time to devote to their projects. They are not used to applying formal workflows in their IEC | A formal but simple project management methodology will be developed to address these needs. |

| Finding | Main discoveries | Proposal for solving it |
|------------------|--|---|
| | work. | |
| Budgeting Tools | The cost estimation techniques are not very developed. | By developing the planning phase of the project, it will be possible to better estimate the cost of the project by subdividing it into smaller work packages. |
| Scheduling Tools | There is a “ball-park” approach to scheduling. Time estimations are done very roughly. | By developing the planning phase of the project, it will be possible to better estimate the duration of the project by subdividing it into smaller work packages. |

4.2. Project Management processes, flow charts and descriptions of the Methodology

Using all the relevant data from the organization, a methodology for project management is developed. One of the main requirements of the IEC is that this methodology be tailored to their specific needs and their way of working.

Therefore, the proposed project management methodology is not a comprehensive approach to all the knowledge areas of project management but rather an initial approach to formal project management, so that projects can move through the project phases in an orderly fashion and yield better results.

The SOS Project Management Methodology will first and foremost recommend the creation of a Project Manager role, to employ standard project documents and to follow standardized project process groups.

The SOS Project Management Methodology employs the 5 Process Groups from PMI's PMBOK as shown in Figure 4:

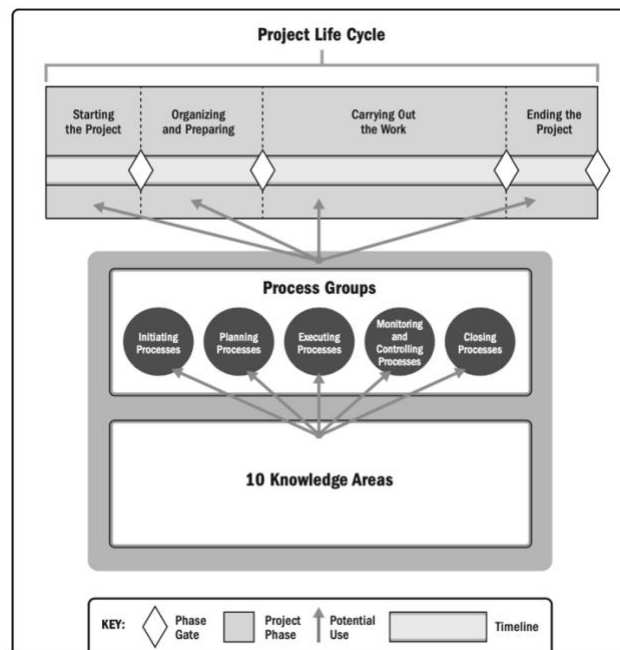


Figure 4 Project Life Cycle, Process Groups and Knowledge Areas (Source: Project Management Institute (2017))

Throughout the whole Life Cycle of the project, the Project Manager will hold the relevant IEC member accountable and will offer help and expertise in each of the stages of the project.

This is a description of the process groups and the documents that will be used in that process group.

4.2.1 Initiating

It is during the initiating process group that a project is approved and the main elements of the project (stakeholders, basic budget, timeframe, scope) are identified. This is done mostly through two processes:

4.2.1.1 Meeting Minutes: The SOS Project Management Methodology uses the same format of meeting minutes as before. These minutes are written by the International Executive Secretary and they are the evidence of official approval for a project to begin.

When a new project is approved and noted in the Meeting Minutes, the IEC member will contact the Project Manager to continue working on the following phases. The template of the Meeting Minutes is found in the next section.

4.2.1.2 Project Charter: This is developed by the IEC member in charge of the project together with the IEC Project Manager, and will serve as the guideline (or baseline) for the project work. The Charter should include the identified stakeholders of the project, as well as the scope, cost and schedule that will serve as the baseline for the planning processes. The template for the Project Charter is found in the next section.

4.2.2 Planning:

During the planning process group the various knowledge areas of the PMBOK (2017) are planned, as a way to ensure the project is integrated using a

comprehensive approach. The following are some of the processes that are developed in the planning process group:

4.2.2.1.1 Create WBS for Scope Management: In order to make the project easier to manage, the Work Breakdown Structure divides the project activities into smaller parts which are then organized in a graphic form for simplicity. This allows the project manager as well as the IEC members to have a clear idea of everything the project entails. The template for the WBS is found in the next section.

4.2.2.1.2 Develop Schedule for Schedule Management: In order to develop a project schedule, an analysis of the WBS takes place to define activities, estimate their duration and effectively sequence them one after another in a way that maximizes efficiency. Then a project schedule is produced. It is important to determine some milestones in the project schedule. The template of the schedule is found in the next section.

4.2.2.2 Determine Budget for Cost Management: Once the schedule and the WBS have been established, it is now possible to determine a budget taking into account all the activities, as well as the time and other resources it will take to effectively carry out the project. The costs for the budget need to be estimated based on expert judgment and other estimation techniques. The template for the Budget is found in the next section.

4.2.2.3 Plan Quality Management: A quality management plan is also developed to identify what the outcome of the project should look like when it is finished. It is necessary to establish the way this quality will be achieved and how it will be monitored, in order to ensure the final deliverables are up to the set standard. This will be achieved by the establishment of measurable criteria for each work package of the WBS and by proceeding with executing two audits: one while the work is being done and another one when the work is completed, before it is accepted. Criteria will vary with every project. The template for this document is found in the next section.

4.2.2.4 Plan Communications Management: Every stakeholder in the project needs to have some form of communication. Some need to be informed, others need to be consulted, others need to receive the deliverable. This will be planned and managed through a Communications Matrix which establishes which methods of communication are used for the project and determines how the communication takes place throughout the project. A few of the elements that are taken into account in the creation of the matrix are the communication requirements of each stakeholder, the language in which it needs to be communicated and the timeframe in which communications need to happen. The template for this document is found in the next section.

- 4.2.2.5 Plan Resource Management:** Every project uses resources, both human resources and material or digital equipment and tools. This process helps estimate these resources and how to manage them accordingly during the project life cycle. The use of tools like the RACI Chart can display this graphically, thus making it clearer to the project team. The final document in this section is the Resource Breakdown Structure which helps have an overview of all the resources in the project.
- 4.2.2.6 Plan Stakeholder Engagement:** The first step is to identify the stakeholders in the project and produce a Stakeholder Register Matrix that includes all the stakeholders, their roles, their expectations, the requirements and their level of Power/Influence. This allows to determine an action plan for each stakeholder.
- 4.2.3 Executing:** This process group involves all the implementation of the project as it has been planned. This is when all the plans and estimations become a reality, and therefore require to be managed effectively so that the project can continue and meet all the requirements.
- 4.2.4 Monitoring & Controlling:** Throughout the project, there are various elements that need to be monitored to be sure they are on track. By using a regular meeting/interview style, the project manager will be able to control that the Scope, Cost, Time and other elements of the project

are on track, as well as handle any change requests in any of these areas. If there are any areas that need change, the Project Manager will execute these changes and, if necessary, consult with the IEC before doing so. A template of the interview questions for these meetings is found in the next section.

4.2.5 Closing: In order to formally close the project activities, either because the project has been successfully completed or terminated early, a Final Project Report is produced and approved by the IEC. This report is delivered to the IEC together with all the deliverables.

4.3. Project document templates

In every project, there are documents that need to be used and standardized to facilitate communication between the various stakeholders of the project (in this case, mainly between the IEC members and the Project Manager). All these documents' templates will be displayed in this section.

4.3.1 Meeting Minutes: The project minutes are filled by the meeting secretary and sent to all the IEC members and the Project Manager after the meeting. The minutes include the date and venue of the event, a table of contents and the various discussion items from the meeting structured with a description, decisions & action points, and concluding comments. Figure 5 shows the proposed template for project minutes for the IEC.

SOS International Executive Council
Minutes of Meeting held 9 to 9 Month 9999 at Venue

Present: Name (President), Name (Vice-President), Name, Name, Name, Name (Secretary)

Invited: Names

Unable to be present: Names

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Distribution List for the Minutes (SOSDN version) (sent on DD/MM/YYYY)
 SOS Documents Notebook

5. Executive Summary

Note: this Executive Summary includes 'hyperlinks'. Click on the hyperlink to go directly to that item in the main body of the Minutes.

6. IEC Action Plan and Budget

(INCLUDING PRIORITIZATION, BUDGET STRATEGY, STAFFING)

Item 1

Description

- Decisions and action points

Concluding comments

Item 2

Description

- Decisions and action points

Concluding comments

7. Regular Reviews & Management

Item 3

Description

- Decisions and action points

Concluding comments

Item 4

Description

- Decisions and action points

Concluding comments

8. Other Discussion Items**Item 5**

Description

- Decisions and action points

Concluding comments

9. Review and evaluation of the Meeting

Description

Points for further consideration:

- Point 1
- Point 2

The meeting concluded.

Figure 5 Meeting Minutes (Source: The Sword of the Spirit)

4.3.2 Project Charter: The project charter is filled by the project manager at the onset of the project. This is where the project is formally established, so it is necessary to assign to it a name, define the start and finish dates, and state the objectives, a brief justification, the deliverables, a simplified budget, milestones and stakeholders. It needs to be submitted to the IEC delegate and approved by him in order for the project to move forward. Chart 9 shows the template for Project Charter to be used.

Chart 9: Project Charter Template (Own development)

| PROJECT CHARTER | | |
|---|-----------------------------|-----------------|
| This document serves as the baseline for Project work. It formalizes the project as well as provides a base project management plan including schedule, scope and budget. | | |
| Date: | Project Name: | |
| 1-Jan-21 | Write the Project Name here | |
| Project Start Date: | Project Finish date: | |
| 1-Jan-21 | 1-Dec-21 | |
| Project Objectives: | | |
| General Objective: | | |
| Describe the general objective of the project, i.e. the main thing it will achieve. | | |
| Specific Objectives: | | |
| 1. Describe some specific objectives of the project here (they are oriented by deliverables) | | |
| 2. Describe some specific objectives of the project here (they are oriented by deliverables) | | |
| 3. Describe some specific objectives of the project here (they are oriented by deliverables) | | |
| 4. Describe some specific objectives of the project here (they are oriented by deliverables) | | |
| Justification | | |
| Write a short paragraph here saying why this project is being done and what it intends to address. | | |
| Project Deliverables | | |
| Describe the products that will come out of this project. This refers to verifiable results of the project. | | |
| Budget: | | |
| Describe the project budget here as well as the methodology for executing it. | | |
| Milestones and dates: | | |
| Milestone | Start date | End date |
| Key milestone | 1-Jan-21 | 1-Feb-21 |

| | | |
|--|------------|----------|
| Key milestone | 1-Feb-21 | 1-Mar-21 |
| Key milestone | 1-Mar-21 | 1-Apr-21 |
| Key milestone | 1-Apr-21 | 1-May-21 |
| Key milestone | 1-May-21 | 1-Jun-21 |
| Key milestone | 1-Jun-21 | 1-Aug-21 |
| Key milestone | 1-Aug-21 | 1-Dec-21 |
| Stakeholders: | | |
| Main stakeholders: IEC Member: Name Project Manager: Name Other stakeholders: Employees Contractors | | |
| Approval: | | |
| Project Manager: Name | Signature: | |
| Authorized by: Name | Signature: | |

4.3.3 WBS: the work breakdown structure is prepared by the Project Manager. In it the various work packages are shown with their work elements and sub-elements. This document serves as a way to provide an ID number to each work package, as well as being an instrument for visualizing the project's requirements and progress. The template for the WBS is found in Figure 6.

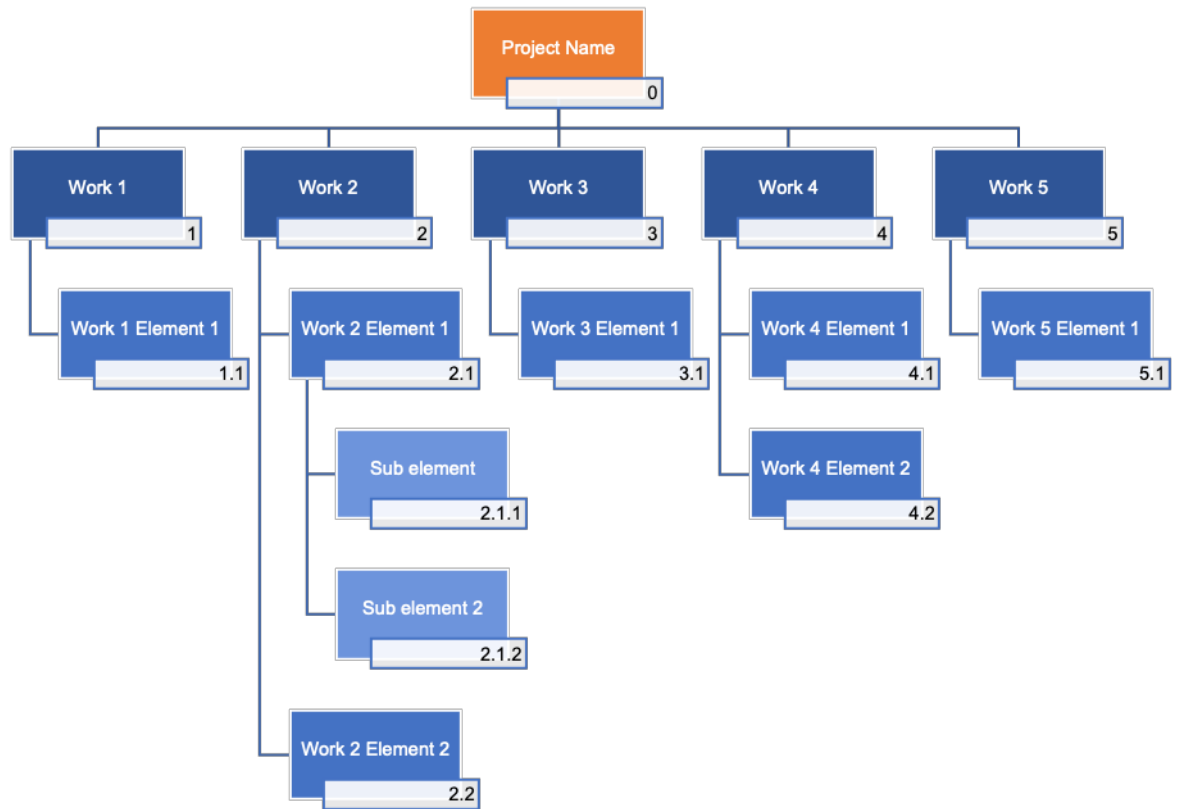


Figure 6 Work Breakdown Structure Template (Source: Own development)

4.3.4 Schedule: the schedule is developed by the project manager after making an estimation for the duration as well as analyzing the milestones and the project's due date. It divides work packages with the same structure from the WBS. Colors are used to show the planned duration, actual duration, milestones and the critical path (which are the activities that need to be done on time to effectively finish the project on time). A template of the schedule is found in Figure 7.

| | | | |
|----------------------------------|-----------------------|--------------------|----------------|
| 4.2 Activity 2 | \$ 200 | \$ 195 | \$ 5 |
| 5 Work Package 5 | | | |
| 5.1 Activity 1 | \$ 100 | \$ 120 | \$ -20 |
| 5.2 Activity 2 | \$ 200 | \$ 205 | \$ -5 |
| Activities Total | \$ 1,940 | \$ 2,020 | \$ -80 |
| Resources | Estimated Cost | Actual Cost | Balance |
| 1 Human Resource | | | |
| 1.1 Project Manager | \$ 500 | \$ 500 | \$ - |
| 2 Materials | | | |
| 2.1 Materials 1 | \$ 100 | \$ 94 | \$ 6 |
| 3 Equipment | | | |
| 3.1 Equipment 1 | \$ 100 | \$ 100 | \$ - |
| Resources Total | \$ 700 | \$ 694 | \$ 6 |
| Contingency Reserve (10%) | \$ 264 | \$ - | \$ 264 |
| Grand Total | \$ 2,904 | \$ 2,714 | \$ 190 |

4.3.6 Quality Management Plan: The quality management plan defines the metrics that will be measured to ensure all deliverables meet the required quality criteria. The acceptance criteria define the minimum value or the bar that needs to be passed in order for the deliverable to be acceptable. Each deliverable will have an audit in the middle of the process and a final audit to ensure it meets the criteria. This document also reflects if the deliverable has passed the audits. It is designed and managed by the project manager. A template for the quality management plan is available in Chart 11.

Chart 11: Quality Management Plan (Own development)

| Quality Management Plan | | | | |
|-------------------------|--------------------------------|------------------------------------|---|---|
| Deliverable | Metrics | Acceptance Criteria | Audit 1 | Final Audit |
| Work 1 Element 1 | <i>(What will be measured)</i> | <i>(What is the minimum value)</i> | <i>(Has it passed the first audit?)</i> | <i>(Has it passed the final audit?)</i> |
| Work 2 Element 1 | | | | |
| Work 2 Element 2 | | | | |
| Work 3 Element 1 | | | | |
| Work 4 Element 1 | | | | |
| Work 4 Element 2 | | | | |
| Work 5 Element 1 | | | | |

4.3.7 Communications Management Plan: The communications management plan is developed by using the communication matrix, which is a document to show the communication requirements of the project and assign each of them a purpose or objective, the medium through which this communication will take place, how frequently it should happen, who is the intended audience of the communication, who is responsible to communicate about it and in which language or languages it needs to be communicated. The project manager creates this document and assists the IEC delegate in using it during the project. A template of the communication matrix is found in Chart 12.

Chart 12: Communication Matrix Template (Own development)

| Communication Matrix Template | | | | | | |
|--------------------------------------|--|--|--|--|--|--|
| Communication | Purpose | Medium | Frequency | Audience | Responsibility | Language |
| Communication 1 | <i>Write the purpose or objective of communicating this.</i> | <i>How will this communication take place?</i> | <i>How often will this communication happen?</i> | <i>Who is the intended recipient of the communication?</i> | <i>Who is responsible to communicate this?</i> | <i>In which language(s) does it need to be communicated?</i> |
| Communication 2 | | | | | | |
| Communication 3 | | | | | | |

4.3.8 Resource Management Plan: Resources in the project are managed with two documents—the RACI Chart and the Resource Breakdown Structure.

4.3.8.1 RACI Chart Template: The RACI Chart stands for Responsible, Accountable, Consult and Inform. This table includes all the work packages and all the stakeholders. Each of them is then categorized with one of these four letters to specify what kind of involvement is required. “Responsible” is the stakeholder who needs to make the work package happen. “Accountable” is the person to whom he must answer to. “Consult” is the stakeholder who can give his opinion on the matter. Finally, “Inform” is the stakeholder that needs to hear a report that the work package has been completed. A template of the RACI Chart is found in Chart 13.

Chart 13: RACI Chart Template (Own development)

| RACI Chart Template | Person / Stakeholder | | | | |
|---------------------|---|----------|----------|----------|----------|
| | Person 1 | Person 2 | Person 3 | Person 4 | Person 5 |
| Activity | | | | | |
| Work 1 | R | A | C | I | I |
| Work 2 | | | | | |
| Work 3 | | | | | |
| Work 4 | | | | | |
| Nomenclature: | <i>R: Responsible A: Accountable C: Consult I: Inform</i> | | | | |

4.3.8.2 Resource Breakdown Structure: Similar to the Work Breakdown structure, the Resource Breakdown structure is a visual way to divide and assign an ID number to all the resources the project will use. This applies to human resources (people working on the project) as well as materials used and equipment employed. Figure 8 shows a template of the RBS.

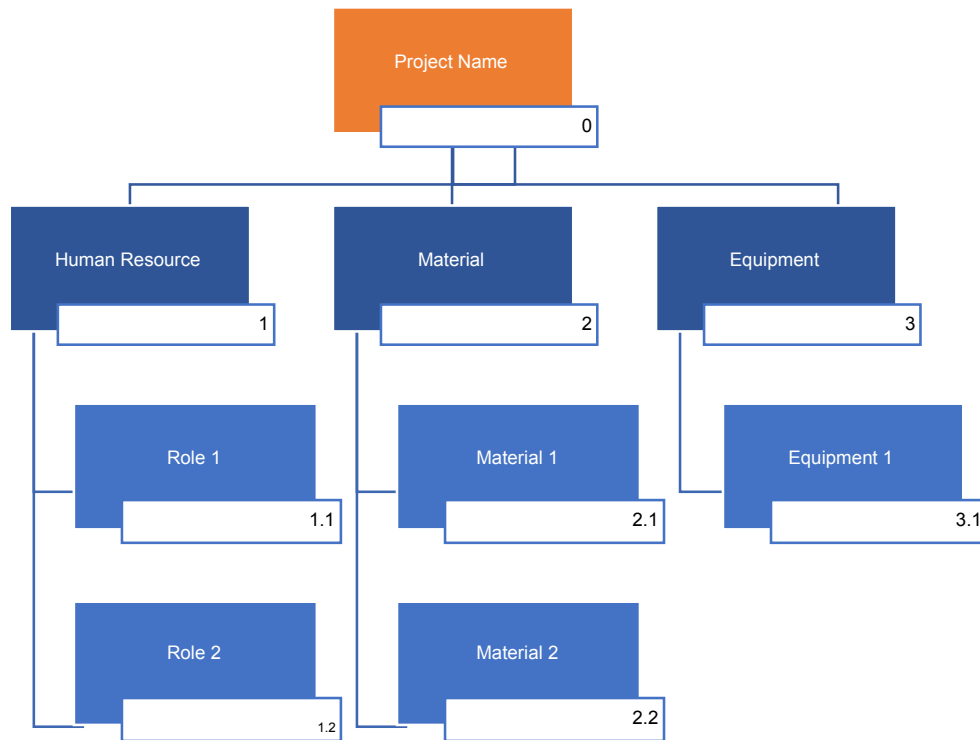


Figure 8 Resource Breakdown Structure Template (Source: Own development)

4.3.9 Stakeholder Register Matrix: In order to keep track of all stakeholders and to be aware of what they do, what they want and what they need, the stakeholder register matrix is a document that is developed during the planning phase of the project and used throughout the project life-cycle. It includes the stakeholders, their roles in the project, the results they expect from the project and the elements the project requires to fulfill for them. The influence/impact balance also displays how much influence they have over project decisions vs. how much impact their participation causes on the overall project. A template for this document is found in Chart 14.

Chart 14: Stakeholder Register Matrix Template (Own development)

| Stakeholder Register Matrix | | | | |
|------------------------------------|--|--|--|---|
| Project Name: | | <i>Type the project name here</i> | | |
| Stakeholder | Role | Expectations | Requirements | Influence / Impact |
| Stakeholder 1 | <i>Describe their role in the project.</i> | <i>What do they expect the project result to be?</i> | <i>What do they need to happen for the project to be successful?</i> | <i>How much influence do they have and how much impact do they have on the project?</i> |
| Stakeholder 2 | | | | |
| Stakeholder 3 | | | | |

4.3.10 Review Meeting/Interview template: One of the roles of the project manager is to monitor and keep track of the project's progress to ensure it is meeting all the criteria from the planning phase. This will be done through regular meetings/interviews with the people working on the various work packages. The meeting can take place in person or it can be sent as a questionnaire to be replied to by email (whenever meeting is not possible). The format of the Regular Review Meeting includes questions about scope, time, cost, quality, communication, stakeholders and resources as well as change requests. A template of the Regular Review Meeting script is found in Figure 9.

Regular Review Meeting

Project Name: *type the project name here*

Date: *DD/MMM/YYYY*

Person being interviewed: *type the name of the person being interviewed*

Person doing the interview: *type your name here*

1. What are you currently working on?
2. Are you currently on track with the schedule? Do you think we will need to make any changes to the schedule?
3. Are you on track with the project cost? Do you think we will need to make any changes to the budget?
4. How are you doing with the metrics for the Work Elements you are working with now? Are you ready for the Quality audit? If not, when will you be ready for it?
5. How have you been communicating with the team and other stakeholders? Do you think we need to make any adjustments to this communication?

6. Do you have access to all the people you need to do your work? If not, who else do you need to access?
7. Do you have access to all the other resources you need to do your work? If not, what do you need?
8. How is your current relationship with the various stakeholders? Do you feel your expectations and requirements are being met? Are you meeting others'?
9. Are there any changes you consider we need to make in the project for it to be successful? Do any of these need to be consulted with the IEC before implementing them?

Figure 9 Regular Meeting Review Template (Source: Own development)

4.3.11 Final Project Report: When the project is finished and all the objectives are met and all the deliverables have been produced, the project manager proceeds with writing a Final Project Report to close the project. This document will then be approved by the IEC or an IEC delegate. This report should include the date, project name, the actual dates on which the project started and finished, the project objectives (from the project charter), a description of what took place during the project and its outcome, a list of the project deliverables that are appended to the report and a final budget showing the estimated amounts vs. the actual expenditure. In case the project was terminated before its completion, the causes for termination will be described under "Project Description". A template of the Final Project Report is found in Chart 15.

Chart 15: Final Project Report Template (Own development)

| FINAL PROJECT REPORT | |
|--|------------------------------------|
| This document formalizes the end of the project. | |
| Date of this report: | Project Name: |
| 1-Jan-21 | Write the Project Name here |
| Actual Project Start Date: | Actual Project Finish date: |
| 1-Jan-21 | 1-Dec-21 |
| Project Objectives: | |
| General Objective: | |
| From the Project Charter | |
| Specific Objectives: | |
| 1. From the Project Charter | |
| 2. From the Project Charter | |
| 3. From the Project Charter | |
| 4. From the Project Charter | |
| Project Description | |
| Explain what happened during the project, what was addressed and what its outcome is. If the project is being terminated early, specify the causes for its termination. | |
| Project Deliverables | |
| Write a list of the deliverables that are being appended to this report. | |
| Budget: | |
| Write the budgeted amounts vs. the actual expenditure amounts of the project | |
| Approval: | |
| Authorized by: Name | Signature: |

4.4. Case Study

This section will apply the Project Management Methodology to an actual IEC project and will explain how the Methodology is being applied at each phase of the Project.

4.4.1 Phase 1: Initiating

The IEC held a meeting, and they discussed a proposal about running an international virtual conference.

This is the excerpt from the Meeting Minutes in which the Project was approved:

International Virtual Conference

We discussed the planning and preparation for these event, including these proposals:

- We should create a planning team, and it has previously been suggested that this should include Name, Name and Name. Excom agreed to appoint these three, plus any others they decide to add.
- We should have a discussion of the remit and scope for the planning team, the boundaries and expectations.

We agreed that the project will be developed by the Project Team.

Figure 10 Meeting Minutes Example (Source: Own development)

At this Point the IEC Planning Team meets with the Project Manager.

Once the project is approved by the IEC and work is commissioned, it is time to develop the Project Charter document.

Chart 16: Project charter sample (Own development)

| PROJECT CHARTER | |
|---|-----------------------------|
| This document serves as the baseline for Project work. It formalizes the project as well as provides a base project management plan including schedule, scope and budget. | |
| Date: | Project Name: |
| 20-Jun-20 | Pronto Conference |
| Project Start Date: | Project Finish date: |
| 20-Jun-20 | 20-Jul-20 |

| | | |
|--|-------------------|-----------------|
| Project Objectives: | | |
| General Objective: | | |
| To run an international virtual conference for young professionals of the Sword of the Spirit communities. | | |
| Specific Objectives: | | |
| 1. To have professional Masters of Ceremonies lead the event | | |
| 2. To produce high quality promotional materials that are distributed worldwide | | |
| 3. To have a keynote speaker address the young people to encourage them | | |
| 4. To have backup speakers that will add to the message of the keynote speaker | | |
| 5. To have a music team able to lead prayer in various languages | | |
| 6. To produce some light-hearted and funny content | | |
| Justification | | |
| During the COVID 19 pandemic there is a need for people to “come out” of isolation and interact with others. With the use of technology there are no boundaries, and so there is a plan to run an online conference for as many young professionals as possible. It will be a high-quality conference. | | |
| Project Deliverables | | |
| There are 2 professional Masters of Ceremonies to lead the event Video and Graphic promotional materials are distributed worldwide A 15-minute talk by a Keynote Speaker Two Supporting testimonies by backup speakers 20 minutes of prayer with an international music team A 10-minute video with light-hearted content and an interactive quiz | | |
| Budget: | | |
| This project will be done with major help from volunteers. However, there are some things that need to be paid for and therefore there is a small budget for it: Project Manager: \$500 USD Zoom Account: \$100 USD Materials: \$100 Contingency: \$100 Total: \$800 | | |
| Milestones and dates: | | |
| Milestone | Start date | End date |
| Assemble a project team | 20-Jun-20 | 22-Jun-20 |
| Assemble sub-teams | 23-Jun-20 | 24-Jun-20 |
| Decide event name | 24-Jun-20 | 26-Jun-20 |

| | | |
|---|------------|-----------|
| Create Logo and Banner | 29-Jun-20 | 02-Jul-20 |
| Open Registration | 3-Jul-20 | 18-Jul-20 |
| Run a Rehearsal Conference | 11-Jul-20 | 11-Jul-20 |
| Run the Conference | 18-Jul-20 | 18-Jul-20 |
| Stakeholders: | | |
| <p>Main stakeholders: IEC Member: Mike Shaughnessy Project Manager: Juan C. Aragón</p> <p>Other stakeholders: Volunteers: Ralph Mascarenhas: Conference Director Mike Shaughnessy: Consultant Mon Samson: Asian Rep Daniel Calderon: Latin American Rep Kevin Coyle: Europe & Middle East Rep Kelly Christopherson: North American Rep JP Fahd: Music Team Juan Pablo Galvan and Emmanuel Leon: PR and Communications Carol Anthony and Rienne Angeles: Video and Graphic Design Anton Colella: Keynote Speaker Abyong Calo and Benjar Cataluna: Technical team lead</p> <p>Participants: Sword of the Spirit Young Professionals Sword of the Spirit Leaders</p> | | |
| Approval: | | |
| Project Manager: Juan C. Aragón | Signature: | |
| Authorized by: Mike Shaughnessy | Signature: | |

The Work Breakdown Structure serves to visualize all the work that needs to be done for this conference.

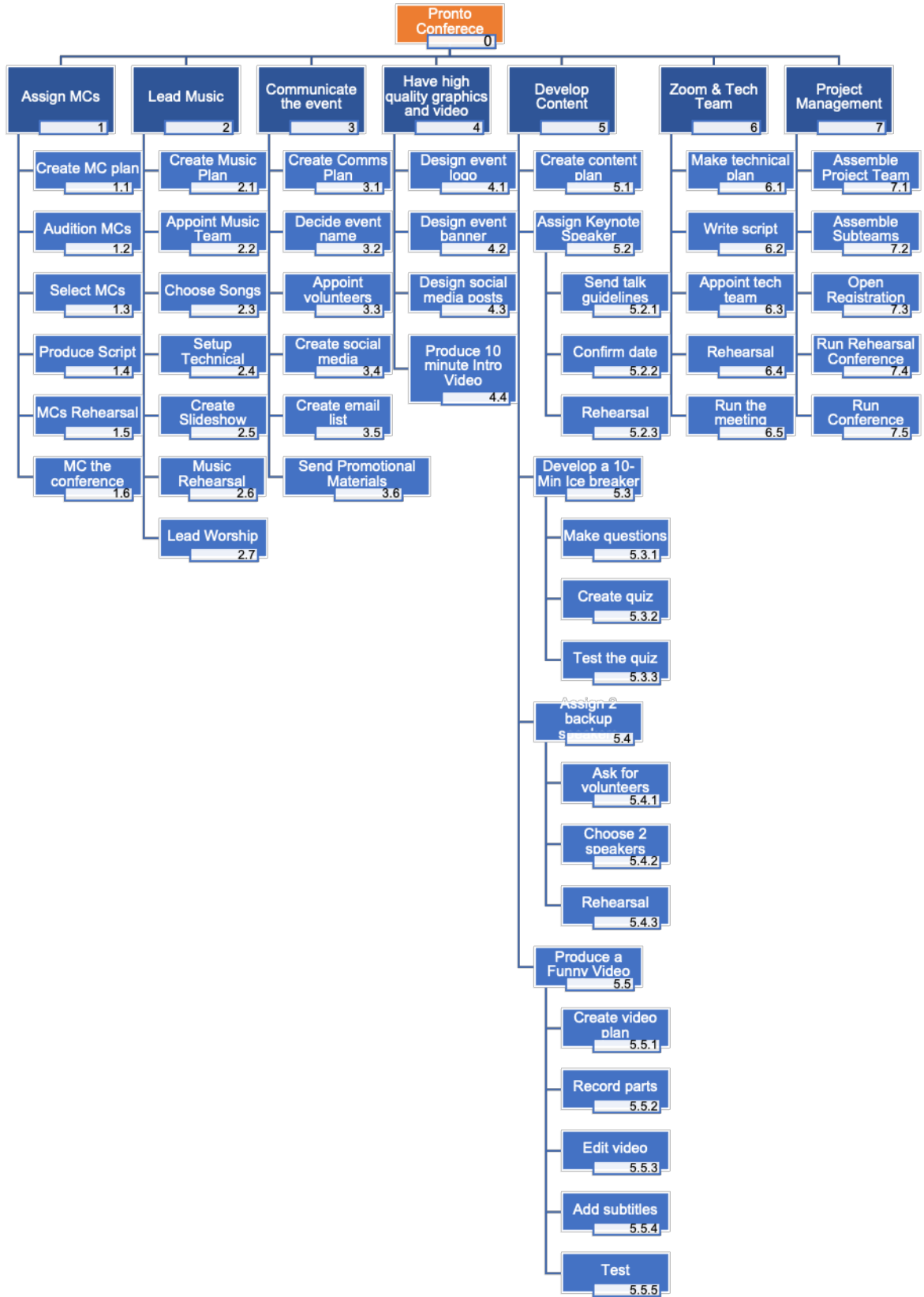


Figure 11 Work Breakdown Structure sample (Source: Own development)

4.4.2.2 Budget

| PRONTO Project Budget | | | |
|---|-----------------------|--------------------|----------------|
| Work Package | Estimated Cost | Actual Cost | Balance |
| 1 Assign MCs | | | |
| 1.1 Create MC Plan | \$ - | \$ - | \$ - |
| 1.2 Audition MCs | \$ - | \$ - | \$ - |
| 1.3 Select MCs | \$ - | \$ - | \$ - |
| 1.4 Produce Script | \$ - | \$ - | \$ - |
| 1.5 MCs Rehearsal | \$ - | \$ - | \$ - |
| 1.6 MC the Conference | \$ - | \$ - | \$ - |
| 2 Lead Music | | | |
| 2.1 Create Music Plan | \$ - | \$ - | \$ - |
| 2.2 Appoint Music Team | \$ - | \$ - | \$ - |
| 2.3 Choose Songs | \$ - | \$ - | \$ - |
| 2.4 Setup Technical | \$ - | \$ - | \$ - |
| 2.5 Create Slideshow | \$ - | \$ - | \$ - |
| 2.6 Music Rehearsal | \$ - | \$ - | \$ - |
| 2.7 Lead Worship | \$ - | \$ - | \$ - |
| 3 Communicate the event | | | \$ - |
| 3.1 Create Comms Plan | \$ - | \$ - | \$ - |
| 3.2 Decide the event name | \$ - | \$ - | \$ - |
| 3.3 Appoint Volunteers | \$ - | \$ - | \$ - |
| 3.4 Create Social Media | \$ - | \$ - | \$ - |
| 3.5 Create email list | \$ - | \$ - | \$ - |
| 3.5 Send promotional materials | \$ - | \$ - | \$ - |
| 4 Have high quality graphics and video | | | \$ - |
| 4.1 Design event logo | \$ - | \$ - | \$ - |
| 4.2 Design event banner | \$ - | \$ - | \$ - |
| 4.3 Design Social Media Posts | \$ - | \$ - | \$ - |
| 4.4 Produce 10 Minute Intro Video | \$ - | \$ - | \$ - |
| 5 Content | | | \$ - |
| 5.1 Create Content Plan | \$ - | \$ - | \$ - |
| 5.2 Assign Keynote Speaker | \$ - | \$ - | \$ - |

| | | | |
|----------------------------------|-----------------------|--------------------|----------------|
| 5.2.1 Send Talk Guidelines | \$ - | \$ - | \$ - |
| 5.2.2 Confirm date | \$ - | \$ - | \$ - |
| 5.2.3 Rehearsal | \$ - | \$ - | \$ - |
| 5.2.4 Live talk | \$ - | \$ - | \$ - |
| 5.3 Develop a 10-min Ice-Breaker | \$ - | \$ - | \$ - |
| 5.3.1 Make questions | \$ - | \$ - | \$ - |
| 5.3.2 Create Quiz | \$ - | \$ - | \$ - |
| 5.3.3 Test quiz | \$ - | \$ - | \$ - |
| 5.3.4 Live quiz | \$ - | \$ - | \$ - |
| 5.4 Assign 2 backup speakers | \$ - | \$ - | \$ - |
| 5.4.1 Ask for volunteers | \$ - | \$ - | \$ - |
| 5.4.2 Choose 2 speakers | \$ - | \$ - | \$ - |
| 5.4.3 rehearsal | \$ - | \$ - | \$ - |
| 5.4.4 Live sharing | \$ - | \$ - | \$ - |
| 5.5 Produce a funny video | \$ - | \$ - | \$ - |
| 5.5.1 Create video plan | \$ - | \$ - | \$ - |
| 5.5.2 Record parts | \$ - | \$ - | \$ - |
| 5.5.3 Edit Video | \$ - | \$ - | \$ - |
| 5.5.4 Add subtitles | \$ - | \$ - | \$ - |
| 5.5.5 Test Video | \$ - | \$ - | \$ - |
| 5.5.6 Play video live | \$ - | \$ - | \$ - |
| 6 Zoom & Tech Team | | | \$ - |
| 6.1 Make technical plan | \$ - | \$ - | \$ - |
| 6.2 Write Script | \$ - | \$ - | \$ - |
| 6.3 Appoint tech team | \$ - | \$ - | \$ - |
| 6.5 Rehearsal | \$ - | \$ - | \$ - |
| 6.5 Run the Meeting | \$ - | \$ - | \$ - |
| 7. Project Manager | | | |
| 7.1 Assemble Project Team | \$ - | \$ - | \$ - |
| 7.2 Assemble Subteams | \$ - | \$ - | \$ - |
| 7.3 Open Registration | \$ - | \$ - | \$ - |
| 7.4 Run Rehearsal Conference | \$ - | \$ - | \$ - |
| 7.5 Run Live Conference | \$ - | \$ - | \$ - |
| Activities Total | \$ - | \$ - | \$ - |
| Resources | Estimated Cost | Actual Cost | Balance |

| | | | |
|----------------------------------|------------------|---------------|------------------|
| 1 Human Resource | | | |
| 1.1 Project Manager | \$ 500 | \$ 500 | \$ 0 |
| 2 Materials | | | |
| 2.1 Background for MCs | \$ 100 | \$ 40 | \$ 60 |
| 3 Equipment | | | |
| 3.1 Pro Zoom Account + Add Ons | \$ 100 | \$ 82 | \$ 18 |
| Resources Total | \$ 700 | \$ 622 | \$ 78 |
| Contingency Reserve (10%) | \$ 100.00 | \$ - | \$ 100.00 |
| Grand Total | \$ 800.00 | \$ - | \$ 178.00 |

Figure 13 Project Budget sample (Source: Own development)

4.4.2.3 Quality Management Plan

Chart 17 Quality Management Plan sample (Own development)

| Quality Management Plan | | | | |
|--|-------------------------|--|---------|---|
| Deliverable | Metrics | Acceptance Criteria | Audit 1 | Final Audit |
| MCs | <i>Diversity</i> | <i>Gender and Cultural diversity</i> | X | <i>(Has it passed the final audit?)</i> |
| | <i>Languages Spoken</i> | <i>English and Spanish</i> | X | |
| | <i>Lighting</i> | <i>The face is clear</i> | X | |
| | <i>Sound</i> | <i>External microphone is used, and sound is clear</i> | X | |
| Graphic and Video Promotional Materials | <i>Style</i> | <i>Modern and simple</i> | X | |
| | <i>Name is visible</i> | <i>Conference name is large and evident</i> | X | |
| | <i>Informative</i> | <i>Information is clear and easily available</i> | X | |

| | | | | |
|---|--------------------|--|---|--|
| | | | | |
| Talk by Keynote Speaker | <i>Relevance</i> | <i>Speaker is relevant</i> | X | |
| | <i>Time</i> | <i>10-15 mins</i> | X | |
| Testimonies | <i>Theme</i> | <i>Related to the main event theme</i> | X | |
| | <i>Time</i> | <i>5 mins</i> | X | |
| Prayer with international music team | <i>Technical</i> | <i>Sound and video quality</i> | X | |
| | <i>Musical</i> | <i>5 instruments and vocals</i> | X | |
| | <i>Languages</i> | <i>English and Spanish</i> | X | |
| Light-hearted content | <i>Time</i> | <i>10 min</i> | X | |
| | <i>Interactive</i> | <i>Works for people on Zoom or Youtube</i> | X | |

4.4.2.4 Communication Matrix

Chart 18: Communication Matrix sample (Own development)

| Communication Matrix | | | | | | |
|-----------------------------|--|---|------------------|---|------------------------|-----------------|
| Communication | Purpose | Medium | Frequency | Audience | Responsibility | Language |
| Team Meeting | <i>Organize the general elements of the conference.</i> | <i>Zoom Meeting Live</i> | <i>Weekly</i> | <i>PM, Director, Regional Reps and IEC Delegate</i> | <i>Project Manager</i> | <i>English</i> |
| Sub-team Meeting | <i>Organize the specific work packages with every sub-team</i> | <i>Zoom Meeting Live & WhatsApp</i> | <i>Weekly</i> | <i>PM, Team Leaders</i> | <i>Project Manager</i> | <i>English</i> |

| | | | | | | |
|---------------------------|--|--|---------------------|--|-------------------------------------|------------------------------|
| Social Media Posts | <i>Promote the event and create excitement about it</i> | <i>Instagram, Facebook and Twitter</i> | <i>Every 2 days</i> | <i>Participants and potential participants</i> | <i>Communications Team</i> | <i>English & Spanish</i> |
| Emails | <i>Send the official information to participants who have registered successfully</i> | <i>Mailchimp</i> | <i>Once</i> | <i>Participants</i> | <i>Communications Team</i> | <i>English & Spanish</i> |
| Report to IEC | <i>Inform the IEC of what the event was, how it went and what plans for the future could be.</i> | <i>Email</i> | <i>Once</i> | <i>IEC</i> | <i>Project Manager and Director</i> | <i>English</i> |

4.4.2.5 Resource Management

4.4.2.5.1 RACI Chart

Chart 19: RACI Chart sample (Own development)

| RACI Chart | Person / Stakeholder | | | | | |
|---|---|------------|-----------------|----------|---------------|------------|
| | IEC | IEC Member | Project Manager | Director | Regional Reps | Team Leads |
| Assign MCs | | I | R | A | I | - |
| Lead Music | | I | A | C | I | R |
| Communicate the event | | I | A | C | I | R |
| Have high quality graphics and video | | I | A | C | I | R |
| Content | I | I | A | C | I | R |
| Zoom and Tech | | I | A | C | I | R |
| Project Management | I | A | R | I | I | - |
| Nomenclature: | <i>R: Responsible A: Accountable C: Consult I: Inform</i> | | | | | |

4.4.2.5.2 Resource Breakdown Structure

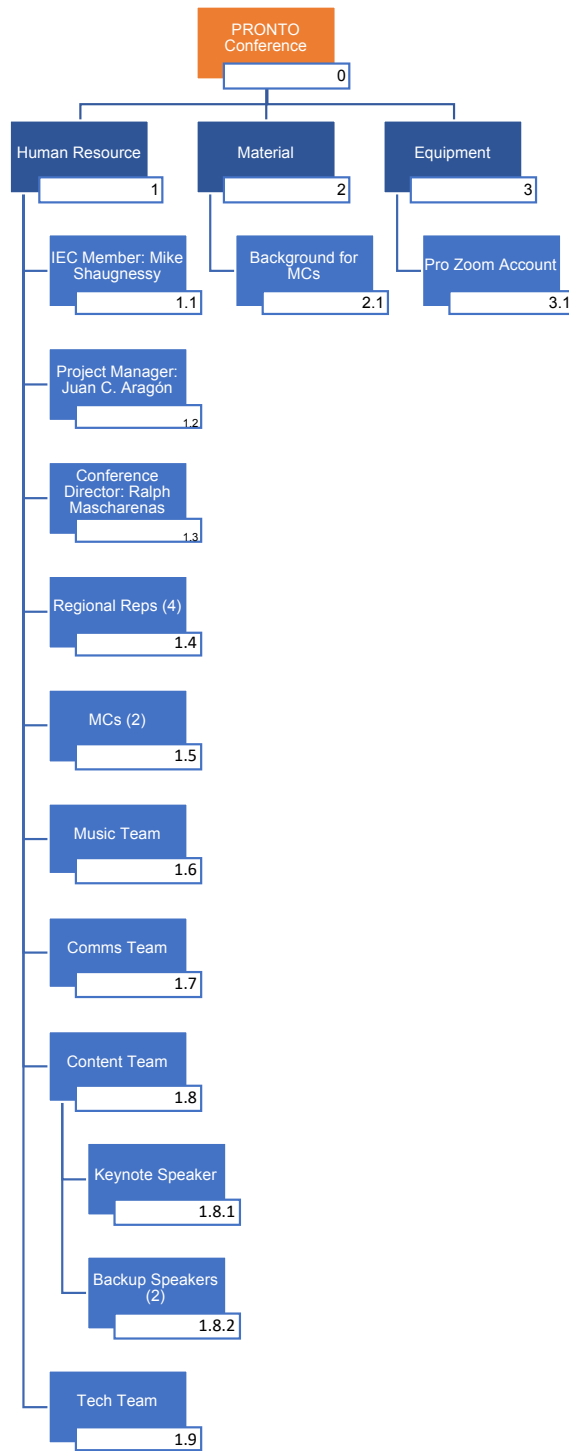


Figure 14 Resource Breakdown Structure sample (Source: Own development)

4.4.2.6 Stakeholder Register Matrix:

Chart 20: Stakeholder Register Matrix sample (Own development)

| Stakeholder Register Matrix | | | | |
|------------------------------------|---|--|--|---|
| Project Name: | | PRONTO Conference | | |
| Stakeholder | Role | Expectations | Requirements | Influence / Impact |
| IEC | <i>Client</i> | <i>The event takes place with as many young people as possible.</i> | <i>Low budget, High quality, High participation</i> | <i>Low Influence / Low Impact</i> |
| IEC Member | <i>Liaison between project and client</i> | <i>The event is remembered by everyone as the first high quality virtual conference for young professionals.</i> | <i>Visual appeal, good timing, high participation</i> | <i>High Influence / Medium Impact</i> |
| Project Manager | <i>Manage the project in all its areas</i> | <i>The project runs smoothly, all the deliverables are produced to the quality standards and all teams are well coordinated.</i> | <i>All teams of volunteers work well and there is good communication between them.</i> | <i>High influence / High impact</i> |
| Conference Director | <i>Lead the Pastoral Team and liaise with the Project Manager</i> | <i>The event is well balanced and will be enjoyable by everyone.</i> | <i>The Pastoral Team are clear and efficient and communication with Project Manager is smooth.</i> | <i>High influence / High impact</i> |
| Regional Reps | <i>Advise the Director and Project Manager</i> | <i>The event is inclusive and representative for all regions.</i> | <i>Translation works well, invitations to register from every region.</i> | <i>Medium Influence / Medium Impact</i> |
| Team Leads | <i>Execute the various deliverables of the project.</i> | <i>The event has the best quality possible.</i> | <i>Communication with Project Manager needs to be clear, and the work of volunteers needs to be efficient.</i> | <i>Low Influence / High Impact</i> |
| Speakers & MCs | <i>Speak at the conference</i> | <i>People are inspired by their words.</i> | <i>They need to prepare both their speech and their technical aspects</i> | <i>Low Influence / High Impact</i> |
| Sword of the | <i>Participate in the event</i> | <i>A fun time together with</i> | <i>Register and attend</i> | <i>Low Influence /</i> |

| | | | | |
|-----------------------------|--|---|---|-----------------------------------|
| Spirit Young Professionals | | <i>other young professionals from the SOS.</i> | | <i>Low Impact</i> |
| Sword of the Spirit Leaders | <i>Invite young professionals to participate</i> | <i>The event inspires their young people to be better Christians.</i> | <i>They need to be informed about the project and send invites and information to their young people.</i> | <i>Low influence / Low Impact</i> |

4.4.3 Executing

During this phase, all the plans are put into implementation mode and all the teams start working on the project. The Project Manager oversees all areas and the monitoring and controlling phase also takes place.

4.4.4 Monitoring and Controlling

Once the project is ongoing, the Project Manager holds a regular review meeting with the appropriate stakeholders to ensure they are making progress as required. In the next section, the minutes of a meeting between the Project Manager and the Music Team Leader are shown to illustrate how this process works.

4.4.3.1 Regular Review Meeting

Regular Review Meeting

Project Name: *PRONTO Conference*

Date: *09/JUL/2020*

Person being interviewed: *Jean Pierre Fahd*

Person doing the interview: *Juan C. Aragón*

1. What are you currently working on?
 - a. We have the music team recruited and we have been choosing the songs so we can rehearse them and make the slideshow. The technical part has been done already.

2. Are you currently on track with the schedule? Do you think we will need to make any changes to the schedule?
 - a. Yes, we are on track. We are finishing the slideshow, but it should be ready for the general rehearsal on the 11th. So we do not need to make any changes to the schedule.
3. Are you on track with the project cost? Do you think we will need to make any changes to the budget?
 - a. Yes, we haven't required any money.
4. How are you doing with the metrics for the Technical Aspect, the music team and the languages? Are you ready for the Quality audit? If not, when will you be ready for it?
 - a. The technical is sorted using a digital soundboard which Serge will manage and we have two cameras so we can show different angles of the music team (especially one for me as I'm leading).
 - b. The music team is looking good, we have 2 guitars, 1 keyboard, a bass guitar, a cajon and 4 singers. There will be some 30 people in the room to create a prayerful atmosphere.
 - c. The Spanish music leader sent me the Spanish songs I requested, and we have been listening to them. I think we are ready to perform them for the rehearsal.
 - d. I think we will pass the audit on the General Rehearsal on the 11th.
5. How have you been communicating with the team and other stakeholders? Do you think we need to make any adjustments to this communication?
 - a. Communication has worked well. You've sent me clear information and so has Ralph. I don't think we need to change anything for now.

6. Do you have access to all the people you need to do your work? If not, who else do you need to have access to?
 - a. Yes, I'm fine!
7. Do you have access to all the other resources you need to do your work? If not, what do you need?
 - a. Yes. Perhaps it would only be helpful for me to have access to the official script of the event so I know exactly when I need to intervene.
8. How is your current relationship with the various stakeholders? Do you feel your expectations and requirements are being met? Are you meeting others'?
 - a. I think it's all working well. I'm happy with what seems to be a very well-organized conference. I hope you will be happy with the service we provide.
9. Are there any changes you consider we need to make in the project for it to be successful? Do any of these need to be consulted with the IEC before implementing them?
 - a. We need to improve in our invitations to Arabic-speaking countries. So far, very few people have registered from here. But apart from that, everything is great.

Figure 15 Regular Review Meeting sample (Source: Own development)

4.4.5 Closing

Once the event is finished and the team has done their evaluation and celebration meeting, it's time to write the final project report which will be sent to the IEC to inform them of how it all went.

4.4.5.1 Final Project Report

Chart 21: Final Project Report sample (Own development)

| FINAL PROJECT REPORT | |
|--|------------------------------------|
| This document formalizes the end of the project. | |
| Date of this report: | Project Name: |
| 25-Jul-20 | PRONTO Conference |
| Actual Project Start Date: | Actual Project Finish date: |
| 20-Jun-21 | 18-Jul-21 |
| Project Objectives: | |
| General Objective: | |
| To run an international virtual conference for young professionals of the Sword of the Spirit communities. | |
| Specific Objectives: | |
| 1. To have professional Masters of Ceremonies to lead the event | |
| 2. To produce high quality promotional materials that are distributed worldwide | |
| 3. To have a keynote speaker address the young people to encourage them | |
| 4. To have backup speakers that will add to the message of the keynote speaker | |
| 5. To have a music team able to lead prayer in various languages | |
| 6. To produce some light-hearted and funny content | |
| Project Description | |
| <p>1. Where it came from:</p> <p>YPOs in the European region are still young and are in various stages of formation and development. In order to help with this, the European region took a leaf out of the North American Region’s book and started running “Legacy Conferences” each year, with the intention to build community among young professionals, encourage discipleship and evangelism and help with YPO formation.</p> <p>This year we were supposed to run the annual Legacy conference in London in May, however the pandemic hit, and it quickly became clear that that would be impossible. There was a strong need felt for running this conference in whatever way we could, so we moved it from a 3-day, in-person conference to a 2-hour virtual conference over Zoom. The intention was similar to the original plan with a focus on building hope in a dark time.</p> | |

The outcome was incredible, and we ended up doubling our numbers from the original sign ups and had a number of people outside the region ask for the zoom details to also join.

This sparked an idea to do something similar again but on a larger scale for the SOS as a whole. Knowing similar aged people across the worldwide network of the SOS and the fact that YPOs are all in similar places, this idea grew very quickly into an effort to make this Global conference happen.

Loneliness and hopelessness amid lockdown drove a concerted effort to use this global conference to bring hope and joy, and this was reflected in the enthusiasm of people offering their time and talents to help.

2. How we organized it

We had a meeting with a group of people from all regions to talk about the initiative. Once we agreed that we wanted to do the event we decided on a leadership structure:

Steering Team: led by Ralph, included the Project Manager and 1 or 2 reps from each region who offered their resources both in personnel and technology.

Execution Team: led by Juan C., included the sub-team leaders for the various teams with members offering expertise from all around the world and all regions of the Sword of the Spirit:

- **Coordinator:** create tasks and objectives for each team and oversee them in their work.
- **MCs:** they were key to have a sense of professionalism in the event
- **Worship and Prophecy:** to have a solid group praying in a room to provide for a prayerful ambient
- **PR & Communications:** this was key for reaching out to many people and leaving us with 2000+ participants. One key element was the formation of a personal network of YPO leaders around the world who could spread the information directly to their people, instead of just relying on social media.
- **Content Development:** to coordinate with the speaker and delegate other points of the schedule
- **Graphic Design and Video:** to design all the graphics and videos as needed by the PR and Communications team or the Content team.
- **Translation:** to ensure translation was available in as many languages as needed (according to the registration). We ended up having 3 languages (English, Spanish and Portuguese)

- **Technology and Zoom:** This team was key for running the meeting. It needs to have expertise and practical knowledge. They created the meeting, arranged the streaming to YouTube and ran the show behind the scenes during the event.
- **Small Groups:** Organize people into small groups for sharing (taking into account people's languages and their ability to engage). There were also groups available in separate zoom meetings for those attending the YouTube stream.
- **Finance:** Pull the required resources to cover the event's expenses

The teams met every other week and most of the sub-teams did their work prompted by the Execution Team leader.

Overall, the people involved in the organization were about 30-35 people to run the whole event.

The timeframe of work between the conception of the project and its final delivery was about 6 weeks.

It was a very successful event out of a small budget of less than \$1000.

3. **How we feel it worked**

The event was overall a success. In terms of the number of participants (2000+), and the representation (all 4 regions + South Pacific + Africa), and the quality of the event (with a good talk by Anton Colella, engaging MCs, fast pace, and interactive moments), and the engagement of people (they all engaged with the event and really enjoyed it), we can say that it was successful.

The evaluation showed people were very excited about the event and looking forward to similar events in the future

Some constraints of running a virtual event:

- Schedule is not comfortable for everyone
- It has to be shorter
- Interaction is good but still feels virtual
- There are technological limitations

Some opportunities of running a virtual event:

- It is free
- It is easy to access (no travel and time off work)

| | |
|---|------------|
| <ul style="list-style-type: none"> • It is widely international • We have access to the best people for each function (speaker, MCs, and other teams) <p>Some surprises of running this virtual event:</p> <ul style="list-style-type: none"> • The prayer time was truly anointed (we think it's due to having the whole prayer and music team in one location) • There were 100+ prophetic words (God can indeed speak to us using technology). | |
| Project Deliverables | |
| A photo of the Pronto Conference is found in Appendix 4. | |
| There is also a short video here: https://youtu.be/SZk_bnU_3LM | |
| Budget: | |
| The project budget was \$800 , and the actual expenditure was \$622 so we ended up with a surplus of \$178 . | |
| Approval: | |
| Authorized by: Mike Shaughnessy | Signature: |

Since the objective of this project is to create a proposal of a Project Management Methodology, the implementation of the methodology is not part of this project's scope. Once the IEC have reviewed this proposal of a project management methodology and decided to adopt it as their new way of work, a project will begin that will cover the implementation of this methodology in the organization which may include some further tailoring, training the members and leaders in Project Management and many other phases that this methodology will need to go through to be fully implemented in the IEC.

5 CONCLUSIONS

Analyzing the results of this final graduation project, it was possible to reach these conclusions:

1. After doing an in-depth analysis of the organization's way of managing their projects, it can be concluded that the Sword of the Spirit needs to develop or adopt a more formal approach to project management in order to be more effective in their international work.
2. Based on the information drawn from the email interviews with the IEC delegate and the analysis of the organization's way of working, it was concluded that the challenges faced by the Sword of the Spirit are the lack of a project manager, the lack of project integration, a lack of change procedures and budgeting and scheduling tools. But the main challenge is their volunteer culture in which most people are doing their projects in their free time. This is something that can be addressed by the implementation of a Project Management Methodology like the one proposed in this Final Graduation Project.
3. A step-by-step description of the proposed methodology has been written and it will be formally presented to the IEC as the first step for them to begin its implementation in the organization.

4. A proposal of a tailored project management methodology was developed to the specific needs of the organization, and it will be adjusted once the IEC has evaluated it and attempted its implementation in their day-to-day work.
5. Templates of Project Documents to address the knowledge areas throughout the five process groups of the project lifecycle have been created to cover the project management concepts that need to be addressed in every project. These will serve as the first step towards more formal project management in the Sword of the Spirit.
6. The lack of integration that comes from not implementing a project management methodology results in various areas of the project being ignored. For example, the stakeholders, quality, resources and communications could be overlooked unless there is a methodology that ensures they are addressed properly.
7. There is a significant amount of “extra” work that needs to be done in the planning phase of projects. However, this results in a significant reduction of the work that needs to be done in the “executing” phase.
8. The methodology was applied to an existing event that was finished recently as a way to illustrate how the SOS Project Management Methodology can be used.

6 RECOMMENDATIONS

After analyzing the results of this final graduation project, it is suggested that the Sword of the Spirit follow these recommendations in order to improve their effectiveness in running successful projects:

1. Every organization, no matter how small or informal, needs a project management methodology if they want to run efficient projects. It is recommended that a methodology be developed in a way that is tailored to the specific organizational needs.
2. The Sword of the Spirit needs to adopt a formal project management methodology and devote some time to adjust the organizational culture, to allow for this new methodology to be implemented and maintained throughout the organization.
3. The Sword of the Spirit needs to regularly evaluate their project performance and decide how they may be able to improve their project management skills. Records of these evaluations need to be kept in order to objectively compare the difference it makes to use a project management methodology or not.
4. It is very important that the IEC members have some training sessions with a Project Manager to help them apply the SOS Project Management Methodology in a more effective way and to form both their way of thinking and their way of working.

5. The IEC needs to evaluate the proposal in this document and consider its application to their current projects. They also need to decide if they want to move towards a more comprehensive approach to Project Management or if they are satisfied with what this project offers them.
6. The IEC members need to understand the importance of proper project planning, which involves a significant amount of work, but one that produces significant advantages for the running of the overall project. Therefore, they need to allocate enough time and resources to complete the planning phase of the project.
7. The IEC needs to think of projects in terms of all the knowledge areas instead of only scope, time and cost. Stakeholders, resources, communications and quality are just as important—in fact, they are vital to ensure the scope, time and cost are fulfilled successfully.

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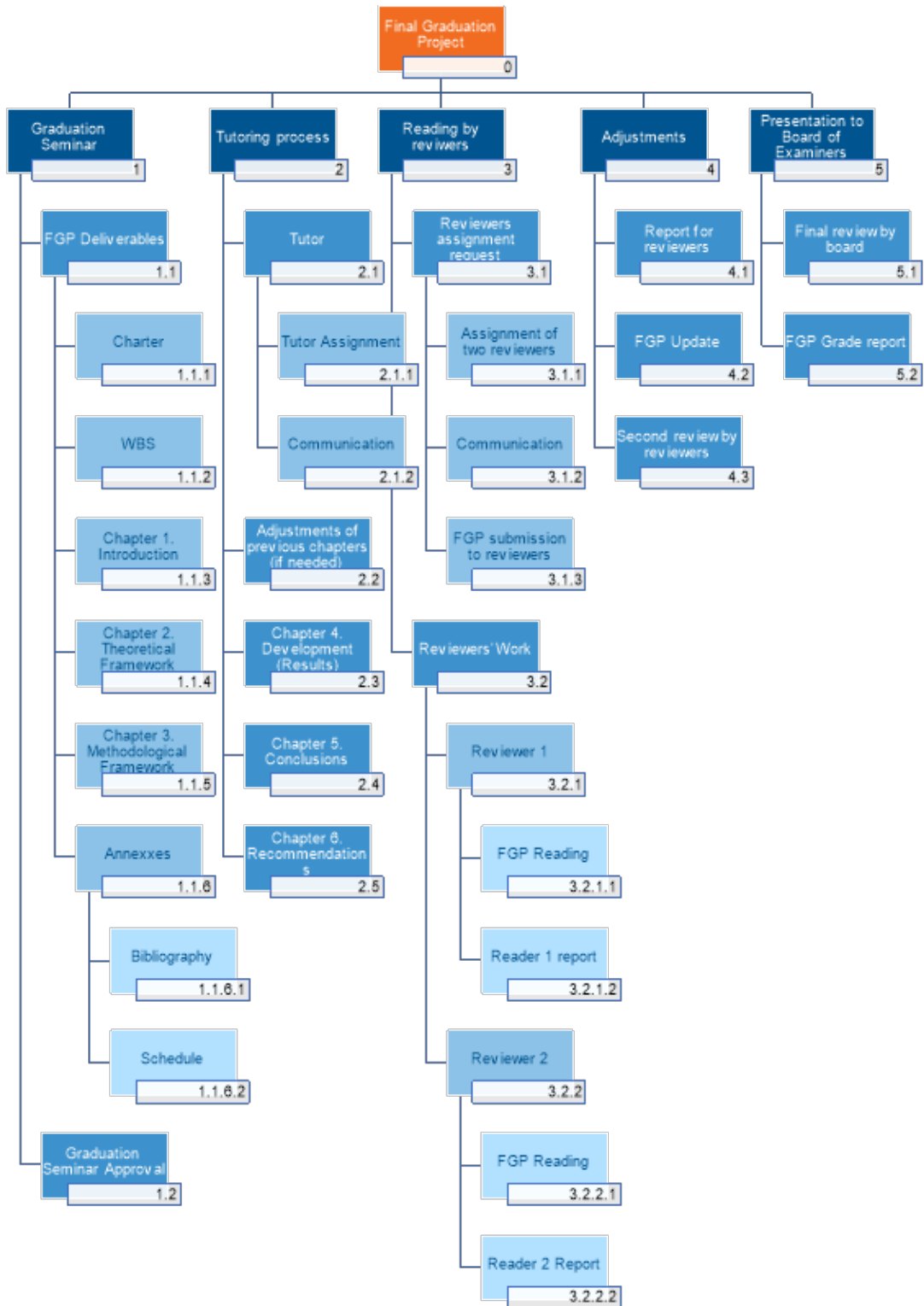
8 APPENDICES

Appendix 1: FGP Charter

| PROJECT CHARTER | |
|---|---|
| Formalizes the project start and confers the project manager with the authority to assign company resources to the project activities. Benefits: it provides a clear start and well-defined project boundaries | |
| Date: | Project Name: |
| 26 October, 2020 | The proposal of a Methodology for Project Management for the Sword of the Spirit International Executive Council. |
| Knowledge Areas / PM Processes: | Application Area (Sector / Activity): |
| <p>Knowledge Areas: Project Integration Management, Project Scope Management, Project Time Management, Project Cost Management, Project Quality Management, Project Resource Management, Project Communications Management, and Project Stakeholders Management.</p> <p>PM Processes: Initiating, Planning, Executing, Monitoring & Controlling and Closing.</p> | Project Management Methodology Administrative/Non-Profit Organizations |
| Project Start Date: | Project Finish date: |
| 26 October, 2020 | 23 April, 2021 |
| Project Objectives (General and Specific): | |
| <p>General Objective:</p> <p>To propose a Methodology for Project Management for the Sword of the Spirit International Executive Council that will optimize the project performance for the organization.</p> <p>Specific Objectives:</p> <ol style="list-style-type: none"> 1. To identify the areas where the organization needs improvement as a way to determine the main elements of the Project Management Methodology. 2. To create the Project Management flow charts and descriptions of processes of the proposed methodology to ensure that it is well understood and implemented. 3. To design project document templates that will serve to apply the standard. 4. To provide an example case to highlight the benefits of the proposed methodology. | |
| Project purpose or justification (merit and expected results): | |
| <p>The Sword of the Spirit International Executive Council is an executive body that directs the work done by the Sword of the Spirit in an international level. Its tasks involve development projects as well as the creation of policy.</p> <p>The International Executive Council (IEC) has a large number of projects assigned to each IEC member but it does not have a common approach to do this work, nor are there any standards or templates. The IEC tried a spreadsheet model in the past that failed. Its failure was attributed to the lack of a project management culture as well as an organizational culture that does not accept deadlines, accountability, resources allocation, etc.</p> <p>This project intends to develop and propose a tailored Project Management Methodology that will be easy to adopt by</p> | |

| | | |
|--|-------------------|-------------------|
| the IEC by optimizing the project management processes that need to be implemented as well as the necessary culture changes in the organization, finding a balance that will be helpful for all. | | |
| Description of Product or Service to be generated by the Project – Project final deliverables: | | |
| A Proposal for a Project Management Methodology that will apply the Project Management Process groups and Knowledge areas. This Methodology will include a standard that can be applied by the organization as well as the project document templates and an example case using one of the ongoing projects. | | |
| Assumptions: | | |
| The organization is interested in receiving this proposal and considering its implementation. There is enough information available for the development of the proposal. There is one IEC member assigned to provide the necessary support for the development of the proposal. | | |
| Constraints: | | |
| Time: Three months (3) Confidentiality: Some documents are confidential and access to them requires some processes | | |
| Preliminary Risks: | | |
| If the organization cannot provide the necessary documentation or information or support there might be delays or gaps in the project execution, thus impacting both the project's time and scope. If the organizational culture proves to be too rigid it may hinder their acceptance of the proposal, thus impacting the project's quality. | | |
| Budget: | | |
| The main deliverable that will require money allocation is the printed Final Graduation Project and its copies. | | |
| Milestones and dates: | | |
| Milestone | Start date | End date |
| Improvement Areas Report | 30 November, 2020 | 13 December, 2020 |
| Project Management Methodology | 14 December, 2020 | 17 January, 2021 |
| Application of the Methodology | 18 January, 2021 | 24 January, 2021 |
| Conclusions and Recommendations | 1 February, 2021 | 15 February, 2021 |
| Tutor Approval | 26 February, 2021 | 26 February, 2021 |
| Review Process | 1 March, 2021 | 19 March, 2021 |
| Presentation | 19 April, 2021 | 23 April, 2021 |
| Relevant historical information: | | |
| N.A. | | |
| Stakeholders: | | |
| Direct stakeholders: Graduation Seminary Professor: Carlos Brenes FGP Tutor: Fabio Muñoz Project Manager: Juan Carlos Aragón IEC Delegate: Richard Perry | | |
| Indirect stakeholders: IEC members UCI Academic Assistant: Gabriela Zúñiga | | |
| Approval: | | |
| Project Manager: Juan Carlos Aragón | Signature: | |
| Authorized by: | Signature: | |

Appendix 2: FGP WBS



Appendix 4: PRONTO Conference Photo



Appendix 5: Revision Dictum

Carlos Alonso Vargas

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SPANISH-ENGLISH TRANSLATIONS



San José, Costa Rica
17 May 2021

TO WHOM IT MAY CONCERN

I hold a bachelor's degree in Linguistics from Universidad de Costa Rica, 1977 (copy attached). I have more than forty years' experience in English-Spanish and Spanish-English translation and philological editing. In 1993 I was appointed an Official English-Spanish and Spanish-English Translator and Interpreter by the Costa Rican Ministry of Foreign Affairs, an appointment that involved written and oral examinations by Universidad de Costa Rica.

I have reviewed Mr. Juan Carlos Aragón's Final Graduation Project for Universidad para la Cooperación Internacional, which I consider a very consistent and well-written paper from the grammatical point of view. The text, however, could benefit from improvements in various points. For that purpose I have given some advice and made a number of corrections, mainly in the areas of style, punctuation and word choice, as well as a few ones of a grammatical and syntactical nature.

Sincerely,

Carlos Alonso Vargas

Appendix 6: Philologist Credentials

