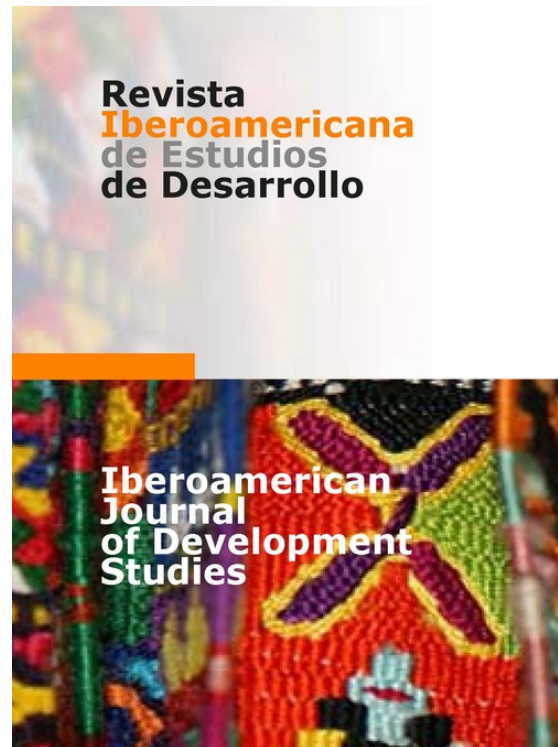

ACCEPTED MANUSCRIPT

**The Project Book: A Toolkit
for Stakeholder
Management in
International Development
Projects**

**El libro del proyecto:
herramienta de gestión de
agentes en proyectos de
cooperación internacional
al desarrollo**

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The Project Book: A Toolkit for Stakeholder Management in International Development Projects

El libro del proyecto: herramienta de gestión de agentes en proyectos de cooperación internacional al desarrollo

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Abstract/Resumen

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Abstract

This article presents a methodology of management of International Development Projects designed for offshoring agents that, on a traditional project management basis (phases and processes), adds an open documentary system (Project Book) and the application of participatory action research techniques. The Project Book enhances transparency and therefore confidence and engagement. Participatory action research techniques support intercultural management of the projects' stakeholders. The methodology has been tested in three cases of «health», «production», and «education sectors», executed in Colombia. The quality and success of the project after the application is characterized by an 80 % acceptance of the agents.

Keywords: international development projects, project management, stakeholder engagement, open documentary system, community participation.

Resumen

En este artículo, se presenta una metodología de gestión de proyectos de cooperación internacional al desarrollo diseñada para agentes deslocalizados que, sobre una base tradicional de gestión de proyectos (fases y procesos), añade un sistema documental abierto (libro del proyecto) y la aplicación de técnicas de investigación-acción participativa. El libro del proyecto mejora la transparencia y, por tanto, la confianza y el compromiso. Con las técnicas de investigación-acción participativa, se apoya la gestión intercultural de los agentes de los proyectos. La metodología ha sido probada en tres sectores —«salud», «producción» y «educación»—, ejecutados en Colombia. La calidad y el éxito del proyecto tras su aplicación se caracteriza por una aceptación del 80 % de los agentes.

Palabras clave: proyectos de cooperación internacional al desarrollo, gestión de proyectos, participación de agentes, sistema documental abierto, participación comunitaria.

Introduction

International Development Projects (hereinafter, IDP or ID projects) are projects that are tasked with achieving the overarching goal of poverty reduction (Ika *et al.* 2020b). They must support economic development and fight poverty through funds that mainly come from external donors (Verga Matos *et al.* 2019). ID projects across the globe have high failure rates (Lazima & Coyle 2019). The traditional and still common focus in project planning only on production of things and not on their influence on the lives of people could be one of the reasons (Frediani *et al.* 2014). According to Upadhyay *et al.* (2024), the lack of human-centred approaches in project management for humanitarian assistance and development projects is the main reason such projects fail to achieve desired outcomes. Another reason is the very complexity of ID projects (Ika 2012), with very diverse stakeholders, both socio-economically and culturally, and topographically dispersed. Geographically distributed projects have increased risks, because of the lack of face-to-face communication; in particular, the potential loss of trust, collaboration, and communication richness (Niddifer & Dolan 2005). Finally, there is the issue of power components among those involved, which prevent equitable and equal relationships. Therefore, some authors go so far as to question development (Escobar 1996, De Sousa Santos 2011).

There is considerable scope for empirical research in this area of adopting project management practices and using tools and techniques in Non-Governmental Organization (hereinafter, NGO) projects. Research could clarify regional and other factors affecting NGO project success and the influence of project management practices when adopted (Jayaram & Bhatta 2022). There are simply too few scholarly works devoted to project management and grand challenges: those wicked, complex, uncertain, messy, and boundary-crossing problems that confront the world (Ika & Munro 2022).

One of the critical aspects to manage in IDP is «interculturality». Although cultural issues have been largely absent from the nonprofit and the NGO research literatures, the organizational implications of societal culture and organizational culture are widely debated within other research fields (Lewis 2002). This research is an empirical study with a focus on the socio-cultural aspect of the projects.

We argue that the existing project management approaches are not suitable enough for local social construction, involving empowerment, learning and choice, in line with various authors, as Lewis (2002), Marier-Bienvenue *et al.* (2017), Lannon

and Walsh (2020), Picciotto (2020), and Moya-Colorado *et al.* (2021). The research presented here has focused on designing and testing an ID project management frame, whose specificity is that has been expressly designed for delocalised agents. The «management frame», based on traditional project management practices, as project life cycle and processes, provides «flexibility», «coordination», and «transparency»: «flexibility», to adapt management instruments to the problem and culture of the recipients, through participatory management of stakeholders and intercultural management; «coordination» and «transparency» by mean of a documentary system, called the Project Book, in which all those involved enter information on the status of the Project in real time, accessible information for the rest of the project stakeholders.

The proposal presented in this research has been successfully tested in three projects carried out in Colombia.

2

Project management methodologies in ID projects

There is no consensus in the literature on how project management should be carried out in IDP. Some authors argue that standardised approaches are needed, others that standardised approaches need to be adapted to each case, and others that specific methods and tools need to be developed (Rodríguez-Rivero *et al.* 2019).

According to Lazima & Coyle (2019), the most cited ID projects-related approaches in literature are: Project Cycle Management (PCM), Result Based Management (RBM), Project Management for Development Professional (PMD Pro), and Project Management for Development (PM4DEV). Some studies have concluded that, in practice, PMD Pro and PM4DEV are rarely used by NGOs (Lazima & Coyle 2019, Verga Matos *et al.* 2019). On the other hand, PCM and Logic Framework are widely used, often due to the needs and expectations of the donors (Golini *et al.* 2017, Verga Matos *et al.* 2019).

The existence of delocalised actors implies intercultural project management, as well as distributed project management. The challenge of «intercultural management» is the awareness of the different mentalities and cultural influences. It is strongly recommended to pay more attention to the harmonization of work mentalities, as well as to the stakeholder-culture management (Huang 2016). Moreover, «distributed project management» drives the need for improved processes, methods, and tools to input and share common data (such as technical, financial, project, and communication) (Nidiffer & Dolan 2005).

The authors of this work agree Golini and Landoni (2014) on the need of specific managerial approaches and tools for ID projects. From that point of view, we complement standard project management methodologies by specific tools, to increase the likelihood that high social impact is the outcome of the project.

3

Stakeholder engagement

The management of stakeholders, which has been imported from the field of strategic management, is currently pivotal in project management. Freeman (1984) is considered the fundamental precursor of the «stakeholder theory». The project management literature recognizes that project stakeholders are important for projects success for, at least, four reasons: *a)* the project needs contributions (financial and nonfinancial resources) from stakeholders; *b)* stakeholders often establish the criteria for assessing the success of the project; *c)* stakeholders' (potential) resistance may cause various risks and negatively affect the success of the project, and *d)* the project may affect stakeholders, in both negative and positive ways (Eslerod *et al.* 2015b).

Around the concept of «stakeholder management», two main approaches have been considered: «management of stakeholders» and «management for stakeholders» (Freeman *et al.* 2007). «Management of stakeholders» has an instrumental focus, while «management for stakeholders» has a normative or ethical basis. In this case, «stakeholders» are not means to specific aims in the organization, but valuable in their own rights.

In relation with the former, different concepts have been defined. One of them is «stakeholder inclusiveness», which refers to the extent to that (in principle) all stakeholders are considered by the focal organization (Eslerod *et al.* 2015a). According to those authors, applying stakeholder inclusiveness in a project *a)* increases the likelihood of more engaged and satisfied stakeholders, *b)* increases the danger of losing focus on those stakeholders who possess the most critical resources for the project's survival and progress, and *c)* increases the danger of inducing stakeholder disappointment, due to expectation escalation and impossibility of embracing conflicting requirements and wishes.

A second concept is «stakeholder engagement». «Stakeholder engagement» can be understood as practices that the organisation undertakes to involve stakeholders in a positive manner in organisational activities (Greenwood 2007). The equivalent term to «engagement» in the field of IDP, and particularly for the

beneficiary of the intervention, is «participation». According to Eskerod *et al.* (2015b), the issue of «participation» also arises in strategic management in the 70s, and particularly thanks to the work of Ackoff (1974) and Dill (1975). In the field of development aid, Freire (1972) and Chambers (1983) are considered benchmarks in terms of «participatory monitoring», understood as a process of transformation and empowerment that contributes to building capacities and promotes self-determination among people, groups and communities in local development contexts and throughout the project cycle. Since the 1980s, international development agencies have progressively incorporated approaches that identify the participation of local actors (Nelson & Wright 1995) in interventions promoted in their communities, as a key element to improve the efficiency, effectiveness, and legitimacy of this type of strategies (Oakley 1991).

At present, the literature on participatory development has privileged the documentation of the potential benefits of participatory intervention models and the development of methodologies and recommendations to improve its application. In this area, it prevails the normative analysis about who should participate, how they should be organized, what is sought and how to do it (Danquah *et al.* 2018, Oakley 1991, Van Heck 2003). «Participation» can foster dialogic spaces for reflexive practice and enable shared and symmetrical opportunities for learning and acting. It is a means and an end, in the sense that organisations development should not only unfold through participatory thinking and decision-making, but also aim to enhance an organisation's ability to work participatively and democratically through participatory thinking and decision-making, but also aim to enhance an organisation's ability to work participatively and democratically (Girei 2017). «Dialogue» is also the arena for assessing effects, proposing new procedures, and reworking agreements. These measures do not prevent conflicts from arising but recognising that conflict is part of collective processes and agreeing from the outset on how to proceed in such situations can also contribute to increasing trust between partners in participatory action research (hereafter, PAR) processes (Vangen Huxham 2003, Silva Rivera *et al.* 2017).

In any case, to this day the «participation paradigm» still faces important challenges, many of them originated in the informal power of the participants (Sarhadi *et al.* 2018). Participatory approaches can have manipulative intent and consequences, serving to obscure and sustain existing power relations, especially when associated with consensus-building intent and/or strategies (Girei 2017). Scholars and practitioners interested in the participatory approach must dedicate more attention to the nuances of the impacts of structural elements, like culture,

gender, patriarchy, and other locational factors on beneficiary community participation (Koomson 2024).

In the field of collaborative environments, communication, and information is key. An appropriate communication strategy must be in place to ensure that stakeholders receive the right message, in the right format, and at the right time (Ika *et al.* 2020a). An open documentary system promotes transparency among the various agents and provides agility when sharing information in real time (Sarker *et al.* 2023). In this line, several methodological and technological solutions applied to different types of projects have been proposed.

On the other hand, participatory techniques link science with people. They have their origins in the research carried out by Paulo Freire (1972), Ivan Illich (1977), John Gaventa (1982) and Fals Borda (1987). These approaches were initially applied to the field of rural development by some NGOs that sought to promote the development of productive and organizational skills of rural communities to gain self-sufficiency and improve their ability to request the services they required from the State. Although some authors, such as Borda himself (Rahman & Fals Borda 1992), are very critical of participatory approaches, PAR techniques are widely used in international development. PAR can engage a wide range of methods to meet the complexities of sustainable development, if the qualitative and participatory dimensions are retained to ensure quality control (Keahey 2021). Specifically, working on information and knowledge issues must be part and parcel of the PAR agenda in international development (Stillman 2013), as a PAR approach can be used for opening communicative spaces on sustainable rural development (Bodorkós & Pataki 2009).

4

Conceptual framework

This research is at project level and under an interpretive paradigm. No perspective is valid for all situations (Pollack 2007), and a pragmatic position is adopted in this work. We understand that project management tools are not the solution, but they are important and help to achieve successful projects. In fact, according to Pollack (2007) again, the tools can be rethought, redefined, and improved to be applied also in complex contexts. However, and particularly in IDP, people are the most important factor, and we position ourselves on the contingent approach side of projects (Söderlund 2011). Contingent approaches have been applied to ID projects since the 1980s but seem to have failed to settle the political

question of power and influence in project management in international development (Ika & Hodson 2014). However, we understand that our proposal and our experience have a place in projects «close to the ground», such as capacity-building projects, although not so much perhaps in large infrastructures. Anyway, project actors are encouraged to reflect on their personal positions considering the power relations which shape project management in ID (Ika & Hodson 2014).

The conceptual framework that has guided the research is based in two fundamental facilitator elements: an open documentary system and PAR practices. They both are contributing to the main goal, in the middle, which is stakeholder engagement, especially in the monitoring and control phase of IDP. On one hand, the open documentary system brings transparency and better communication to the project. It will include information on the progress of the project, decisions taken, changes made, etc. Several studies (Moya-Colorado *et al.* 2021, Naeem & Akbar 2022) argue that it is necessary for information to be shared in open access, to advance along the various possible lines in a truly innovative and socialising way. According to Cuevas-Silva and Jiménez-Correa (2018), the open aspects between agents allow for a greater plurality of verifiable information, that meets the requirements demanded by the accrediting organisation, in this case for ID projects. The open documentary system seeks to promote free access to project monitoring and control information in an orderly and standardised manner, enabling interoperability between agents.

On the other hand, applying techniques linked to PAR help to manage different cultures (for instance, adapting the techniques, language, templates, etc., to their local significance), as well as to understand the processes during the whole cycle of the intervention.

It is difficult to find studies that show a relationship between cultural management and participation in projects. Pillay and James (2013) developed the notion that cross-cultural management is a process whereby people, through social interactions, acquire cross-cultural and participative competence for working in cross-cultural settings, such as multinational teams. However, most studies about cultural management or about participation link these concepts with communication (Bjerregaard *et al.* 2009, Dyer *et al.* 2014, to cite but a few). «Communication» could be the key variable through which cultural management facilitates stakeholder participation and involvement.

Project implementation context including beneficiary trust in project governance does influence beneficiary engagement (Bandé *et al.* 2024). Project management success becomes more likely as the degree of collaboration improves which, in turn, is influenced by an increase in the level of trust between team

members (Bond-Barnad *et al.* 2018). The use of clear performance measures represents practices of integrity and accountability, contributing to increased stakeholders' trust and confidence in their organizations (Aboramadan *et al.* 2021).

The present research is based on the use of an open methodology and participatory methods, putting stakeholders at the centre contextually and culturally, thus generating openness, accountability and transparency in ID projects. Engagement «of» stakeholders is used to assess the applicability of the methodology and the success of the project after implementation. Engagement «for» stakeholder is used in the implementation of the methodology, mainly through PAR techniques, adapting the language and tools to improve understanding, participation and the methodology itself.

Figure 1 shows the conceptual framework that has guided the research.

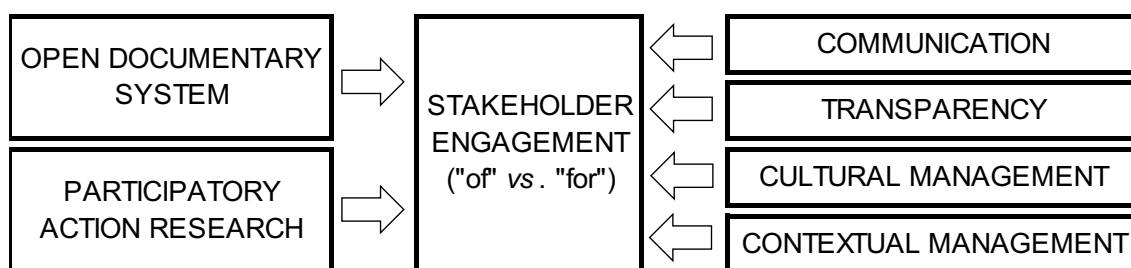


Figure 1

Research methodological-conceptual framework

5

Methodology of project management aimed to stakeholders

Based on the conceptual framework that has guided this research and based on the methodology for monitoring and control developed by Montes-Guerra *et al.* (2012) and Díez-Silva *et al.* (2012), a new version has been developed that is summarized below. The final result has been elaborated after the accomplishment of the hermeneutic study, the adaptation to the casuistry of the agents «South», the results of the case studies and the contributions and critics of the scientific community.

Montes-Guerra *et al.* (2012) and Díez-Silva *et al.* (2012) proposed a project management methodology, based on delocalised main stakeholders. It could be said

that this design was made with a rather traditional vision of project management, based on processes.

It can be adapted to projects of any kind, with stakeholders belonging to different organizations. From the point of view of the international cooperation project cycle, it is properly focused on intervention, and particularly on monitoring and control, since in practice many projects of this type are clearly divided into two: an initial one of design and funding search, and another, probably with some significant differences, and delayed in time, which is the intervention itself (Ika *et al.* 2010).

There is no consensus around which the stakeholders that intervene in the development of a project are. Four have been considered in this work: «promoter» (P), «financier» (F), «executor» (E) and «beneficiary» (B). It is a methodology aimed to delocalised stakeholders, since the processes and documents have been broken down stakeholder by stakeholder in a coordinated way, so that their joint or individual use allows to organize all the work involved in the execution of a project. The methodology has been designed with the project manager of the different stakeholders in mind.

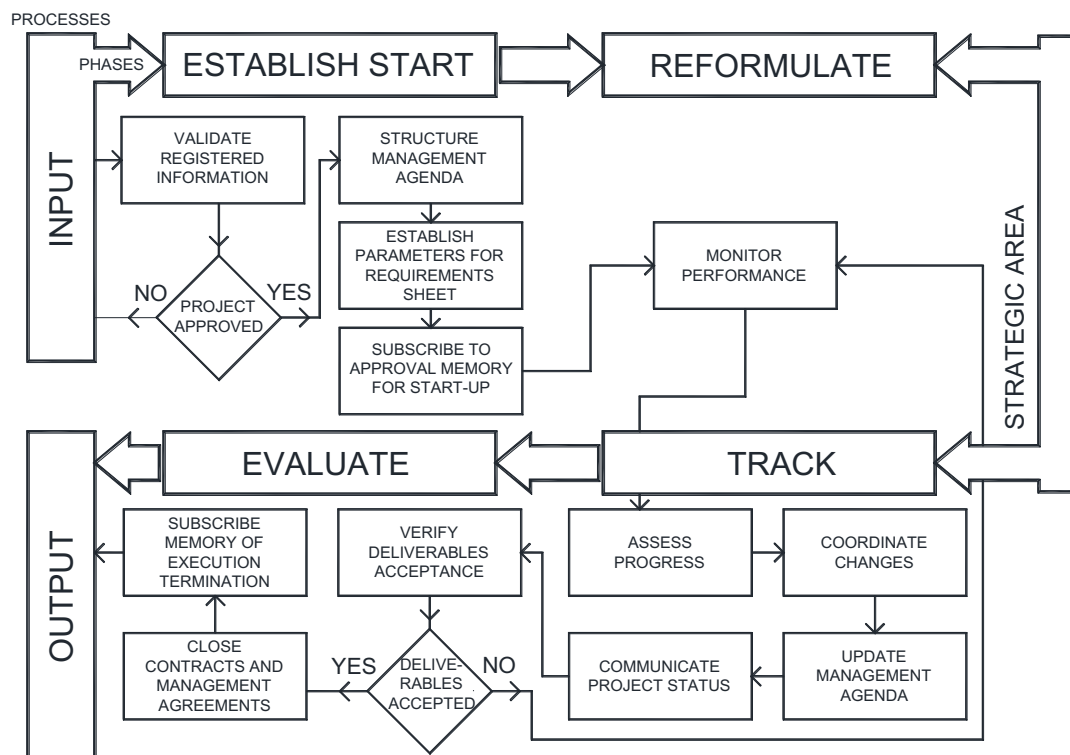


Figure 2

Project management methodology of Montes-Guerra *et al.* (2012) and Díez-Silva *et al.* (2012).

The methodology proposes a life cycle in three phases (see Figure 2). The first is called «Stablish start». Its purpose is to facilitate the transition between the stage in which the project has been approved by the financing agent and the start of execution activities, thus establishing the real and physical start of the process. To carry out this first phase, all the information with which the project was previously approved must be received, to verify its content and availability of resources, and to delimit an operative panorama for the execution.

The second phase is called «Reformulate-Track» (it is separated in two sub-phases in Figure 2). It involves the execution and control of the planned tasks. It includes the management of the potential changes to be made throughout the intervention.

The last phase is the «Deliver-Evaluate». The purpose is to verify that all the proposed deliverables for the project have been obtained to the total satisfaction of the stakeholders. If it is verified that all the deliverables have been accepted, and all the management and contractual agreements that have been operated because of the execution of the project will be closed. In addition, at the end, all stakeholders approve and endorse the conclusion of all the activities foreseen in the management agenda that correspond to the execution of the project.

Among other tools, what we call «Project Book» has been incorporated. It is an open documentary system, to monitor and control interventions in real time (see Table 1). The system is constituted by different documents that gather project requirements, tasks, timelines, status reports, etc. Every document is linked to its respective stakeholder, but all of them are put in a visible place. Therefore, every stakeholder knows what is happening, what has been done, the issues and the changes of the project.

PHASES		Nº	DOCUMENTATION	STAKEHOLDER			
				Financier	Promoter	Executor	Beneficiary
ESTABLISH STRART	Validate information and structure management agenda	1	Planning checklist		x		
		2	Management agenda		x		
	Receive project and designate project team	3	Certificate of project receipt and responsibility acceptance	x		x	x
	Establish requirements sheet	4	Parameters of requirements sheet		x		
	Gather team and deliver documentation	5	Call for meeting	x	x	x	x
	6	Technical agenda for project launch	x	x	x	x	
	7	Authorisation memory for project launch		x			
REFORMULATE-TRACK	Update project and desing plans	8	Plan timeline and management agenda			x	
	Collect information	9	Project update and verification			x	
	Verify progress and project status	10	Stakeholders, risks and quality log			x	
	Update and communicate project status	11	Report of project work and milestones		x	x	x
	Intervene	12	Report of changes and status	x			
		13	Report of status and acceptance		x		
EVALUATE	Document final report	14	Document of intervention			x	
		15	Learned lessons			x	
	Receive and evaluate final report	16	Work team assessment			x	
		17	Final report of project			x	
		18	Certificate of final report receipt	x	x		x
		19	Memory of project outcomes and management		x		x
		20	Accountability report for stakeholders	x			
	Certify project close	21	Closure act	x	x	x	x

Table 1

Documentation associated with every project phase and stakeholder.

In addition, an implementation guide for the Project Book has also been designed (see table 2). The follow-up of the book focuses on the phases of execution and control and closure of IDP. However, emphasis must be placed on the interactions of the processes, from a systemic point of view, throughout the intervention.

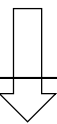
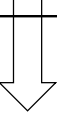
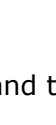
IMPLEMENTATION GUIDE. PROJECT BOOK	
STAGES	TASKS
 START	Deliver Project Book Initial meeting Qualify for use and application Appropriate concepts and processes
 PROGRESS	Insert information Gather information Organize and process information Analyse information and reports
 END	Understand information Assess project Assess process Feed and modify methodology

Table 2

Stages and tasks of the implementation of the Project Book

Participatory management techniques are another fundamental element integrated in the pre-existing methodology. The documentation allows to make available to the stakeholder other techniques that help to encourage their participation in the project according to their capacities in project management.

In short, it is a project management methodology aimed at project stakeholders to facilitate design, participation and quality. It does not intend to be an alternative to previous methodologies, but rather a management experience in line with the most current trends, in the sense of an inclusive, adaptive and flexible project management.

6

Research methodology

The research presented here was developed in different stages. In them, different social research techniques were applied depending on the stakeholder (financier/promoter/executor/beneficiary) and the objective to analyse, as well as the particularities of the agents and the context, as can be seen in Table 3.

RESEARCH STAGE	RESEARCH METHOD	STAKEHOLDER
Conceptual	Hermeneutics study about research topic	Promoter/Executor North
	Questionnaire about the use of project management tools in IDP	
Design	Development of the methodology	Financier Promoter Executor North Executor South
	Validity of the contents of the Project Book using qualitative techniques: expert judgement, semi-structured interviews, questionnaire and participant observation	
Empirical	Implementation of the Project Book through case studies and adaptation of the Project Book using PAR techniques	Beneficiary South
		Executor South
Analytical	Review of gathered information	Promoter/Executor North
Dissemination	Assessment, suggestions and guidance	Financier Promoter Executor North Executor South

Table 3

Phases in research, methods, and agents

In the stage called design, the Project Book was created as a management tool for the International Development Cooperation (IDC) area, based on the research of Montes-Guerra *et al.* (2012) and Díez-Silva *et al.* (2012) and the hermeneutical study carried out in two areas: IDP and project management. It is an applied science research, where the method is first designed, then applied and finally fed back. The Project Book is the spiral development of its different versions or prototypes. The main idea lies in the construction of a base methodology, where the information of the project is captured.

The methodology has been tested in three development cooperation projects executed in Colombia and financed by Spanish organizations. It is a multiple case study according to the number. In addition, the selected projects serve a typology of stakeholders, who are ungrouped and geographically disaggregated from a «North and South» logic, corresponding to a traditional IDC scheme, as shown in Figure 3.

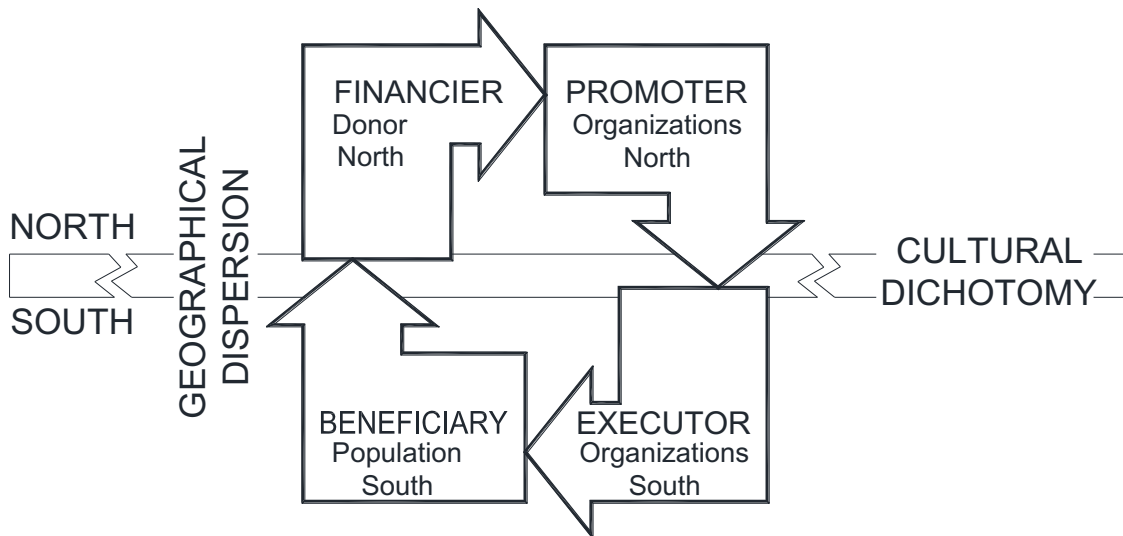


Figure 3

Relations between stakeholders in IDP from a North and South logic

The cases have been chosen based on a logic that follows the key processes for project management developed by the University of Berkeley (Kwak & Ibbs 2002). In this model, the management levels of the agent under analysis are categorised into what are called «maturity levels». Level 1 corresponds to low management knowledge and level 5, to optimal levels of organisation for intervention management processes. The following cases are presented in this research:

- Case 1: project management data is not consciously obtained or analysed in projects. On the scale: level 1.
- Case 2: there is multiple project management in the intervention. Data and process are integrated, analysed and measured. On the scale: level 4.
- Case 3: planning is done, and data is managed both formally and informally. On the scale: level 3.

Based on this description, the methodology is applied to the project, observing its use and application and, in the everyday nature of IDC intervention, evaluating whether the participation of the stakeholders in the interventions selected for the case study is improved when the cultural dimension is made more flexible.

The aim is to verify both the utility of the proposal for the stakeholders (executor and beneficiary) in the different interventions, as well as the participation in the real environment where the actions are carried out. The cases are selected according to variables such as the «level of maturity» of the organizations involved,

according to the (PM)² model (Kwak & Ibbs 2002), and other elements, such as «scope of action», «type of organization», «participation in planning», «stakeholders», and «capacities of the agents» (Montes-Guerra *et al.* 2012) and time they have been working together.

In addition to a detailed follow-up of the same, data on the projects has been compiled. The description includes the most relevant information about the application of the Book, its documentation and the results obtained during the entire process. Most of the information that has been collected in field work has been transcribed by compiling the information obtained in a field diary. In this line, the assessment of the methodological design was analysed based on the eight criteria presented below:

- Utilization of processes: the phases have been carried out in accordance with the methodological design.
- Understanding of the language: the language used in the Project Book and its contents are easy to understand.
- Division of tasks: team members can assume and respond to the role and functions that correspond to the tasks associated with their role.
- Interaction between project team and documentation: the process has been developed with a reciprocal relationship between members of the project team and with respect to documentation.
- Approval: the methodology generates the documentation that allows for the approval of the project requirements.
- Administrative burden: amount of available time that has been invested in adapting and applying the tool.
- Technical difficulty: level of difficulty in using the entire documentation system and in implementing and bringing the application to reality.
- Definition of functions: the methodology is clear on the roles to be played by the persons in the project team regarding the application and use of the documentation system.

Secondly, for the measurement of the results of the project, eight variables have been established, which are explained below:

- Work carried out: measurement of the cost of the units produced out of the units planned, which can be expressed in economic terms.
- Physical progress: percentage completed of planned work.
- Duration: time taken to complete the tasks in relation to the planned time.

- Costs: sum of disbursed and committed amounts of the allocated budget.
- Documentation: number of deliverables planned and delivered.
- Changes: number of changes implemented in the project up to the monitoring date.
- Conflict resolution: ability to mediate in conflicts between project participants.
- Organization: it has been possible to carry out the activities according to plan and in an appropriate manner.

To collect the evidence, observation and participation techniques were used to explore and describe contexts, environments, cultures, communities, customs, roles, activities, etc. In addition, they served to understand processes, relationship networks between people and their circumstances. From those evidence, concrete actions can be proposed to improve documentation and make it more flexible and adapt it to PAR.

Consequently, a series of questions were asked (21 closed and 7 open) in reference to the previous items and deepening in the understanding of the methodology, the flexibility, and the adaptation to the cultural realities of the participants; aimed at evaluating the participation in the intervention and the use of the methodology. Each item was scored on a Likert scale, according to the degree of satisfaction in the realization of the project and in the use of the tool. The scale goes from 1 («not satisfactory») to 5 («very satisfactory»).

With the development of the case studies, it is also intended to verify the participation of the agent in the project management, because of the flexibility in the application of the methodology, considering the capacities of the stakeholders proposed by Montes-Guerra *et al.* (2012) and their level of maturity in project management according to the (PM)² model of Kwak and Ibbs (2002). In this way, the stakeholders that in other methodologies would be «object» of study become «subjects» protagonists of the project, making them participants of all its phases («design», «action», and «evaluation»).

In summary, the qualitative research methods used were as follows:

- Participatory observation through field stays, in the case study projects with actors in the south.
- Semi-structured interviews with actors and experts in ID projects (north and south).
- Field diaries.
- Photographic documentation of the case studies.

- Documentary analysis of the different methodological tools for the management of the interventions used in the northern and southern organisations.

Likewise, PAR specific methods were as follows:

- Research reflection meetings with researchers and experts in this field from the north and south dichotomy.
- Community meetings to adapt the Project Book tools to the understanding and cultural contexts of the implementing agents and southern beneficiaries.
- Consensus and capacity building activities on projects with executing agent and beneficiary south.
- Leadership training for executing agents (south) on project phases, agents, and evaluative aspects.
- Knowledge exchange with southern researchers.

7

Results

7.1. Cases development

Table 4 presents a summary of the fundamental characteristics of the three cases, as well as the result of the initial assessment of the stakeholders' capacities and of the beneficiaries' management levels. To synthesize, we will proceed to the presentation of the most outstanding elements of each project and how the methodology was applied.

TYPOLOGY OF THE PROJECTS						
ANALYSIS ELEMENTS	CASE 1		CASE 2		CASE 3	
	E	B	E	B	E	B
Area of action	Nutritional recovery		Productive and water distribution		Technical training	
Type of organisation	Religious	Unorganized	Producers' Federation	Coffee cooperative	Staff	Student body
Kwak&lbs' (PM) ² model	2	1	4	3	4	2
Stakeholders' skills Montes-Guerra (2012)						
Institutional capacity	3	1	5	4	4	2
Coordination	2	1	3	4	4	2
Credibility	3	3	3	3	3	3
Participation in the planning	No	No	Si	Yes	Yes	No
People involved	4	60	15	535	10	500
Previous collaboration between stakeholders						
Executor + Promoter	7 years	No	12 years	No	1 year	No
Executor+Beneficiary	No	No	No	2 years	No	No

Table 4

Analysis elements in the case studies

The first project is called Nutritional Recovery Project of Children of Chocó. The department of Chocó has a high rate of conflict, when compared to the rest of the regions of Colombia, with high mortality and crime rates, as well as illicit exploitation of emeralds and gold. In this context lives the Afro-Colombian population of the city of Quibdó, which presents high rates of child malnutrition, therefore the executing agent (a congregation of religious nature) decides to execute the intervention. The beneficiaries are 30 minors and their parents, who participate during a year in a weekly action where they receive food, diverse care, paediatric and nutritional guidance, and workshops for families on topics of interest. The financing and promoter agents are in Spain and have been supporting the project economically and technically for five years.

The team of the executing agent is made up of a director, a part-time social worker, two child educators, a cook, a multipurpose employee, a paediatrician, and a part-time nutritionist. The social worker is appointed to lead the implementation of the methodology. After a certain time, it is the director herself who assumes that role, due to the social worker's low dedication to the project.

There is discontent within the team, since the economic cuts that the project has suffered have considerably reduced their assignments. That translates into growing absenteeism. In addition, there is a conflict of roles and competencies within the executing team that affect the project:

We do enough for what they pay us (frequent comment among executing team staff) (Interview 7).

The beneficiaries also have difficulties to participate, such as lack of money to take the bus; an adverse climate, that together with malnutrition, makes the children sick frequently, a lack of appreciation of the project, etc. Some beneficiaries abandon the intervention and new ones enter. The lack of regularity in terms of assistance and the illiteracy of the beneficiaries also make it difficult to apply the methodology.

It was necessary to work hard at monitoring the project's tasks, as well as adapting the language of the methodology itself. Participatory techniques (meetings, interviews, observation, and accompaniment) make it possible for beneficiaries to understand their role in the intervention and express themselves more openly.

Throughout the project, there is a growing interest in the methodology by the executing agency, since some of its observations have been included, and assistance

to the program of project activities has increased. By making the concepts and documents more flexible, a higher level of communication between the stakeholders was encouraged and generated. Throughout the implementation, there is constant monitoring and accompaniment («face-to-face» and «virtual»). The videoconference was well received and was able to contribute to greater participation. The beneficiary agent needed assistance in filling in the documentation, as most of them lacked literacy skills. Finally, once the intervention has been completed, the results are discussed, and the process is fed back. In any case, certain misgivings continue to be observed until the end of the intervention, as some members of the executing team seem to perceive that they are being evaluated.

The second case study is carried out in a coffee strengthening project in the municipality of Santa Inés, in Valle del Cauca of Colombia. The objective of the intervention is the organizational strengthening of rural coffee communities through the implementation of a strategic plan with two fundamental points: the education of the coffee farms cooperative on capacities and production, and the construction of a potable water pipeline, since the current one is insufficient and does not have the adequate sanitary conditions. The beneficiary agents are, therefore, producers belonging to a coffee cooperative that groups 158 families, with 535 people benefiting directly and some 1500 benefiting indirectly. They have been associated for 15 years, which facilitates teamwork. The management committee is made up of 10 people, representatives of the associated families, and states that they have never used any standard, technique, or project management tool, and that their knowledge about it is almost nil.

The executing agent has been developing productive projects since 1999. In 2009, the organisation met a Spanish NGO, promoter agent, which obtains financing routes for their projects. People in the organisation have experience in executing rural development interventions and project management. In some cases, they have used a methodology provided by the Colombian state to formulate and plan the proposals. It has its own documentation, but it is focused on the financial aspect. There were clear weaknesses in the technical management of the project, and isolated calendars. On the other hand, it is a team of 15 people, where 75 % of its members are volunteers from several countries.

After the training process and familiarization with the proposed methodology, appropriate adjustments are made to adapt it to the language, capacities, and internal dynamics of the agents. The executing agent justifies the non-use of some processes and formats of the methodology and acknowledges the usefulness of others. As the project progresses, the executing agent appropriates the processes, and remarks their usefulness to improve communication with the cooperative. The

greatest difficulties arise within their own work team, since involving the whole team, to make the process participatory led to the emergence of different criteria and misunderstandings. It was necessary to resort to negotiation techniques among the members of the team to agree on a new division of work. Communication workshops were also held to try to improve the work environment.

On the other hand, the methodology served to check the degree of training of the various stakeholders in project management, which does not always turn out to be the one they had told. It also helped to see the errors of coordination with the promoter agent, and the weaknesses of the project proposal that at the time got funding, which was very focused on the financial aspect:

Many things happen between formulation and execution; the two activities need to be linked. The formulation gives me some basis, but I must take that to a time when I must execute and detail a little more [...]. There are many contexts that can change, like the volunteer staff that we have (comment of the project leader) (Interview 12).

The final assessment by the executing agent was positive. Although the application of the methodology initially led to additional problems, the participatory nature of the methodology was considered enriching for the team and the intervention, favouring a climate of dialogue.

The beneficiary agent initially needed a higher level of advice and adaptation of the methodology. However, once that process was overcome, and thanks to its previous direction and a clear and common vision of the project, the methodological application was considered successful:

It has been very helpful to see elements that we did not consider before and that influence the success of the project. Defining the roles and responsibilities has been positive and has helped to organize us better (comment from a beneficiary) (Interview 9).

More graphic formats were suggested, as well as concrete examples of the training process. As the learning curve improves, the use of the documentation is greater and shows more benefits for the work; this perception is very important, since the implementation of the Project Book means strengthening the tool in the long-term knowledge. It is observed that, as the processes are applied, the project and the achievement of its benefits improve.

The third case takes place in the neighbourhood of La Candelaria, in the city of Bogotá. It is a place with great social inequalities and critical overcrowding. Young people have scant prospects for the future, and many of them end up committing criminal acts and falling into drug trafficking networks. In this context, the Escuela Taller (executing agent) was born in 2006; its function is to contribute to the maintenance and preservation of historical centres by training skilled labour in crafts as diverse as masonry, carpentry, forging, painting, ceramics, gardening, and facilities. It has local institutional support, as well as the participation of international entities that were linked to the process (financing and promoting agents).

The team of the executing agent is made up of ten members trained in educational competences and management of educational projects. It has a relatively complete documentary system, through which various operating data are collected, but cannot be considered as a method.

The beneficiaries are 500 students or graduates aged between eighteen and twenty-five years. After going through a selection process, they receive a modest amount of money, while they are trained for one year in one of the trades. These are unemployed young people, many of whom have had social problems, with various previous academic levels and with important skills, especially manual. The students are represented by a student council of six members, democratically elected by the students themselves. They have no knowledge in project management.

The good level of communication between the promoters, funders and executors was a great advantage at the beginning of this case study. In addition, the executing agent already had the methodology before the first visit and had become familiar with it. The appropriate adaptations are made to the project typology, and it begins to be applied. On the other hand, the researcher and the methodology are presented to the student council, who ask for some clarifications and agrees to be considered. They make some demands, such as improving the food and the allowance they receive, as well as making more efforts to find a job for them.

With the observations and interviews, it is perceived that the syllabus is fulfilled, but that there are relational aspects that bring problems, causing a climate of conflict. The possibility of imparting some hours of education in values arises, but the academic program is very tight:

Education in values is very good, but the tasks need to be finished and that's what they come for, to learn a trade that makes them leave the climate of violence that they suffer around them. The profile of youths should be better chosen, to avoid problems (opinion of a teacher) (Interview 11).

After various group dynamics and negotiations, a list of basic rules of behaviour in the classroom, as well as the consequences of non-compliance, is produced.

In the final evaluation phase, the students have stated that they have felt heard. The management technique of the executing team considers that the use of the methodology allows the collection of additional information of interest for the project:

The best method to formulate all this to the most illiterate person or to the most educated person is always through a dynamic, performance or work; that is, representing what they think or feel, because if things are said very technically people do not understand as well as if it is a dynamic in which the person gets into the role and expresses what is really happening [...] (opinion of the management technician of the executing agent) (Interview 15).

Figure 4 shows the results of the application of the methodology, based on the various evidence: analysis of documentation, researcher's field notebook, interviews, surveys and focus groups. In general, it is considered that the methodology presents a profit of more than 70 %. Regarding the degree of understanding, the valuation is higher than 80 %, and only in one of the projects is less than 60 %.

The tasks have been carried out with a participative monitoring by all the stakeholders, with open information and with only one management system. Likewise, the quality and success of the project after the application is characterized by an 80 % acceptance of the agents. Analysing other issues and considerations, the tool provides an improvement in the monitoring and control of the project of more than 80 %, contributing to its success.

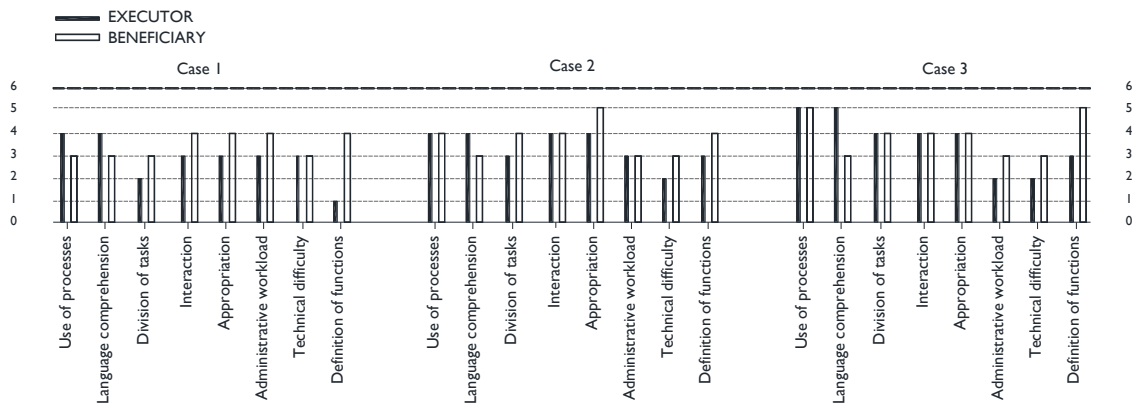


Figure 4

Results of the stakeholder’s participation in the application of the methodology

Figure 5 shows additional results of the application of the methodology. The descriptive statistical analysis explored correlations between the variables corresponding to the criteria in relation to the success of the project and the application of the methodology. The success of the Project Book depends largely on the interest and willingness of the executor agent to provide access to the beneficiary agent. The working model is applicable from a «Northern» IDC logic. From a «Southern» perspective, the adoption of another worldview makes its application difficult, highlighting the discrimination and cultural need of each group of people to be addressed and encouraging the «effective» participation of every stakeholder in the project.

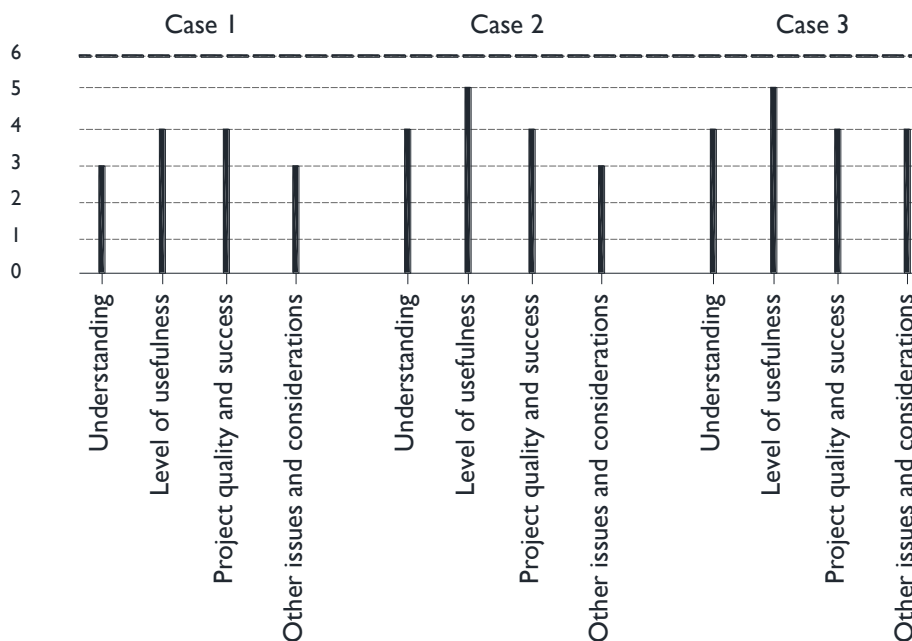


Figure 5

Aggregate results of the methodology assessment

7.2. Discussion

The proposed methodology is the spiral development of the different versions or prototypes of the Project Book. For this, the ID project management methodology was applied in contrast it with real practice in the organisations studied, taking as a reference the agents (financier, executor, promoter, and beneficiary) involved in an ID project.

Therefore, the Project Book focuses on the actors involved in the management (funder, promoter, executor, and beneficiary), with each having different roles and responsibilities. It promotes the creation of a horizontal aid chain. The information to be filled in the documents is open access to all persons, referring to Charvat (2003), who indicates that one of the best practices to facilitate project adoption is to ensure that it clearly defines roles and responsibilities, promotes open and direct communication channels, allowing those involved to immediately see the advantages to be gained from implementation. The aim of having several actors filling the same document with open access for both is to corroborate information from different points. In this sense, it implies that institutions and actors are open to create transparent models that generate objectivity and veracity of interventions for the benefit of accountability throughout the project life cycle.

PAR techniques validate multiple sources of knowledge and promote the use of multiple methods of discovery, implementation, and dissemination of knowledge (Stillman 2013). In this research, the proposed methodology has been readjusted as the exchange of knowledge and information between stakeholders was taking place. It has been adapted to the general casuistry, making processes, languages and using PAR techniques more flexible. As a result, a progressive strengthening of the organization towards autonomous processes is achieved in relation to the rights, duties, and responsibilities within the intervention. Long-term sustainability is promoted, as it is the stakeholders who take ownership of all phases, leading them towards their needs, and owning their own development.

In this line, there is a certain difficulty for many people to express their ideas, feelings, and perceptions in writing, and this is where PAR is taken as a methodological basis, and the researcher's task is to facilitate and promote the group process, characterized by the establishment of a joint participation in the analysis and development of the process. The results reaffirm the findings of Amin *et al.*

(2023), that monitoring, and evaluation activities can serve multiple purposes, including the collection of data for the assessment of inputs, outputs, outcomes, and impact. This information is shared with stakeholders to assist in evidence-based decision-making, to improve project impact on community.

Existing social and power relations also highly structure communicative spaces in rural areas (Bodorkós & Pataki 2009). The previous capacities of the stakeholders, as well as the relationships between them, have influenced the development of the cases, particularly in the first two. In the first project, the beneficiary agent has very low levels of literacy and organization. In addition, the researcher, one more agent in the intervention, does not have the possibility of working with them independently. The relationship is determined by the executing agent's contact, due to distrust and how the aid chain is established, within the vertical hierarchies of the intervention. In the second case, the cultural differences within the executing agent's team cause more problems than the differences between the different agents. This may be due to the existence of many different nationalities within the team, while among the intervention's agents there are only two different nationalities. Examining within-organisational power relations provides an important window into the real nature of participation, empowerment and partnership in development cooperation practices (Yang 2022). Another reason, according to Gervedink Nijhuis *et al.* (2012), is that aid organizations and international project teams frequently lack cultural understanding to create conditions related to ownership and adequate project management. It is therefore important to improve the cultural competence of project managers, as well as to address project management methodologies in IDP that incorporate an intercultural approach as a dialogue between stakeholders.

After the methodology's application, additional variables were detected, that make up the relationships between heterogeneous stakeholders in IDP, which are not simple, due to the existence of various gaps between them. The viability of the project in this aspect is favoured by the presence of intervening institutions with capacities, such as the strength in the management of human, economic and material resources; the establishment of internal communication channels in the organization, as well as a good policy of communication and cooperation with other institutions, public and private, favouring networking; the direction of the organization, especially in those sectors in which the projected actions are circumscribed, taking advantage of the know-how that has been accumulated in the form of intellectual capital; the knowledge and the rooting of the entities in the territory in which the project is circumscribed, which favours the proximity between the stakeholders and the understanding of the interests of all the parties. As Diallo and Thuillier (2005) state,

project success is strongly linked to communication and cooperation between stakeholders. At the end of the day, the human factor is behind all the successes and all the failures of the projects.

The common previous direction of the participating organizations has been considered an important element to achieve a more participatory and coordinated intervention. It also seems necessary that the beneficiary agent has a minimum organizational capacity to promote the process of dialogue and participation.

The methodology has been able to contribute, among other factors, to the results of the executed projects, considered from the point of view of the project management (scope, costs, and deadlines). In any case, its successful application must be considered because the beneficiaries use it and perceive its usefulness as a tool to be able to express opinions, consult, learn, and influence decision-making (see Figure 4). We understand that, through participatory processes and their subsequent learning, we contribute to the creation and capture of value by the beneficiaries. The creation of benefits for a wide range of stakeholders, as indicated by the management paradigm for sustainable development, invokes learning, adaptation, and transformation with stakeholders through a process of co-creation within the context of the project. In this sense, we think that the success of the projects should be defined in terms of value creation.

In short, we consider that the results of the application of the Project Book and PAR techniques have contributed to a more determined outcome of the meta-conditions identified by Ika and Donnelly (2017), as relevant to the success of the IDP of capacity building: commitment of stakeholders, collaboration, alignment, and adaptation.

In line with the conclusions of Moya-Colorado *et al.* (2021), the use of a common project management methodology could improve project efficiency, implementation and accountability for all. Such a common methodology, with a common language, could also create new learning and development opportunities.

8

Conclusions

This research presents a methodology for the management of IDP, designed expressly for delocalised agents, which has been tested and developed through three cases. The methodology is based on two fundamental pillars: an open documentary system called Project Book, and participatory action-research techniques. It is a novel

approach, that aims to add flexibility, adaptability and transferability to classical project management methodologies.

Any management approach to be applied in this context must be adaptable, to be useful in very diverse cases. Every stakeholder is horizontally involved during the projects. For each organization, a concrete relationship model is made, which must consider the idiosyncrasy of the entity, so that the application of the methodological tool generates transparency and flexibility and, consequently, the participation of the stakeholders and satisfactory results are obtained for the intervention.

The premise that has guided the investigative process is that transparency and the intercultural management of the projects improves trust and communication and allows a greater engagement of the stakeholders. This casuistry will generate social learning and capacity building, that will strengthen the sustainability of the intervention.

The fundamental limitations of the study lie in the small number of cases, although it has been about projects in different areas (health, production, and education), and in the context of international aid. An approach based on project manager competencies could also have been used, in line with standards such as International Project Management Association's Individual Competence Baseline or Project Management Institute's Project Manager Competency Development Framework, among others. This would be a complementary approach of great interest, but at this stage of the research it was decided to focus the study on the specific application of the Project Book and PAR techniques. Finally, the research's proposal aims to look for a model that works, as well as possible, in the system's current structure. If the sector was more horizontal and flexible, it would be possible for the beneficiaries to get involved earlier and participate in the design of the project itself.

On the other hand, it is necessary to continue deepening the development and improvement of the methodology; a task that will never end, due to the advancement of knowledge and the permanently changing characteristics of the project and its environment.

9

Competing interests

The authors declare no competing interests.

Ethical statements

The personal data of the interviewees were processed according to the protocol established by Universidad Pública de Navarra (Spain), institution to which the researchers belong. Informed consent was obtained from all participants.

No biological data has been collected in this study. Neither opinion or beliefs on socio-economic, religious or political aspects have been collected. All analysed information was limited to the technical aspects of IDP and the used project management methodology.

Availability of data/materials

Materials, data and associated protocols are available on request (Spanish).

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