



Planning and  
Development  
Commission



**WHAT DO  
THESE 3  
PICTURES  
HAVE IN  
COMMON?**



*Share your comments in the chat!*

# The PDC Capacity Building Series Initiative

## **CONCEPT**

- Introducing a series of Capacity Building modules
  - 45 min each
  - for chess leaders / administrators
  - to reinforce their skills
- A mix of theory and practical illustrations to better project on the covered topics

## **APPROACH**

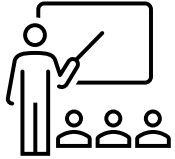
- Modules answering needs from the interested parties
- Topics related to the FIDE Federations Management Handbook
- Synergy with FIDE Commissions, Continents, Zones and Affiliated Organizations
- Programs to support the capacities of federations

# The FIDE PDC Capacity Building Series

Module 1

Project planning basics

# Our objective for the next 45 minutes



- Present
  - The key concepts of project management and planning
- In a simple way
  - Considering that we are not experienced professional project managers



- Explain & share
  - Steps and tools, useful for a pragmatic approach of your projects
- In an illustrated way
  - Using an actual project led by the FIDE Arbiters' Commission during the pandemic: the training of Arbiters for Online & Hybrid Tournaments

# Overview

- What is project management?
  - The systematic application of processes, methods, and tools to achieve project objectives
  - Effective project management involves balancing scope, time, cost, quality, and stakeholder expectations
- The importance of project planning
  - Planning is the foundation of successful projects, ensuring clarity, direction, and alignment of efforts
  - How effective planning minimizes risks, helps in resource allocation, and facilitates smoother project execution

Trying to manage a project without project management is like trying to play a chess game without a plan.

# Project

## PMI DEFINITION

A project is  
a temporary endeavor  
undertaken to create  
a unique product, service or result.

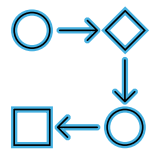
## CHARACTERISTICS

Clear start  
and end

Definite  
boundaries

Creates  
something  
new

Not  
business  
as usual



Project

or

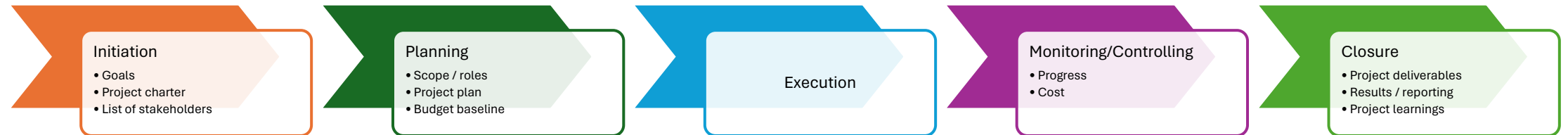


Business as usual ?

- Organise the annual General Assembly of the federation
- Host a continental championship
- Calculate the national rating for the federation
- Change the rating system for the federation
- Introduce chess in schools



# Project lifecycle: the 5 phases of a project





# Phase 1: Project initiation

- From an abstract idea ...
- ... to a meaningful goal
- Define scope and boundaries
- Identify stakeholders

# S.M.A.R.T. goals: *An idea is not enough*

## Clearly defined and achievable goals

- Specific = focused on a clear area
  - Organise Hybrid & Online Training Educate arbiters
- Measurable = capability to evaluate
  - Sessions of 20-30 participants Online training sessions
- Achievable = reasonable to accomplish
  - Basic 8 hours / Advanced 8 hours -
- Relevant = aligned with your context/expectations
  - Boom of online chess with the pandemic -
- Time-bound = realistic but ambitious end date
  - Launch within 6 weeks Launch within a week

# Project stakeholders

## INTERNAL

- Project Team
  - People executing the project
- Project Manager
  - Responsible for the delivery of the project
- Sponsor
  - The federation = owner: provides resources, seeks funding ...

## EXTERNAL

- The ones affected by the project outcome, although not involved in the execution:
  - Players: often your « client »
  - FIDE PDC: external partner
  - Ministry of sports/education
  - Sponsors

Understand interactions

# Project Charter

- Materialize the existence of the project
- Main elements covered
  - Title & description
  - Project manager & team members
  - Objective & goals
  - Scope definition
  - Stakeholder identification
  - Project justification
  - High-level timeline
  - Budget
  - Risks & Assumptions



INTERNATIONAL  
CHESS  
FEDERATION

APPENDIX B – FUNDING REQUEST

## 1. GENERAL INFORMATION

- If you submit several projects for the year, please present one Appendix B for each of them.

SUBMISSION DATE:	
APPLICANT:	
CONTACT EMAIL:	
CONTACT WHATSAPP OR PHONE:	
DEVELOPMENT LEVEL FOR 2023:	
PROJECT NAME:	
PROJECT START DATE:	
PROJECT END DATE:	
PROJECT DESCRIPTION:	
PROJECT OBJECTIVES:	1. 2. 3. 4.
EXPECTED NUMBER OF PARTICIPANTS:	
PROJECT WEBSITE/SOCIAL MEDIA:	
PROJECT EXPECTED OUTCOMES/DELIVERABLES:	1. 2. 3. 4.
PROJECT TOTAL BUDGET (euro): (Including other income)	
FUNDING AMOUNT REQUESTED FROM FIDE FOR THIS PROJECT (euro):	

## 2. PROJECT'S PRIORITY AREAS

- Tick the FIDE priority areas to which your project corresponds:

Hosti	
Partic	
Talen	
Chess	
Mana	
Socia	
Wom	
Life-l	
Spons	
Mark	
Prese	
Non-	
Lobbying efforts for the inclusion of chess into Continental Olympic Games	<input type="checkbox"/>
OTHER	<input type="checkbox"/>

PDC Appendix B:  
A familiar format  
close to  
the project charter concept



## Proposal on Online/Hybrid Arbiter Training

25/01/2021 (revised 15/02/2021)

### Context

The chess world observed a sudden growth of official online and hybrid chess tournaments due to the Covid-19 pandemic in 2020. This phenomenon was not at all anticipated and no space was left for a proper transition: most of the organizations were made on “best effort”, learning on the spot. During the last FIDE General Assembly, regulations for online and hybrid chess were adopted. This is a fantastic opportunity for growth and involvement of federations in online chess. However, this also represents a major challenge for most federations, due to the lack of experience and training. The FIDE ARB commission organized a successful awareness session in June (5400+ views on Youtube), which demonstrates the interest about the role of arbiter in online chess events. Now, our objective is to step up and see FIDE massively support federations to get ready for the coming online and hybrid events.

### Vision

We can't train everyone to become expert online arbiters in a few hours. BUT we can start with training 1 or 2 arbiters from EACH federation, so that they understand the basics of online and hybrid chess and help propagate technical skills and experience in federations. Improving skills, reducing fears, directly contributing to the development of chess!

The FIDE ARB introduces 2 courses – see appendix for details:

- Online/Hybrid Arbiters (Basic), 8 hours: focus on regulations, player supervision in online/hybrid
- Online/Hybrid Arbiters (Advanced), 8 hours: focus on tournament management, case studies

### Training Offer and targets – Initiating the loop

**Scope:** 195 national chess federations  
**Target:** Mass deployment on 300+ arbiters trained on the “basic” course (1 to 2 per federation, selected by their national federation)  
**Sessions:** 4 x 2 hours of training (Zoom + FIDE Learning Management System – Chamilo) in groups of 30 arbiters maximum, by official FIDE Lecturers with online experience.  
**Schedule:** Start ASAP, with the objective to concentrate all sessions within a 6-8 weeks period.  
**Management:** Central management under the control of the ARB, with support from PDC (KPI's definition and follow up) and Zonal Council (composition of training groups) as appropriate.  
**Support:** Possibility of Q&A and networking with the trainers and other participants after the sessions, to maximize chances of success.

### Cost

Training cost: 800 € per session  
Admin cost: 50 € per session

### Funding

For the mass deployment of training (initial offer described above), FIDE sponsorship through the FIDE Development Fund (10 200 €).

For subsequent sessions (targeting individuals instead of federations) funded by participants' fees.

You may need to « sell »  
your project

More informal  
presentation

## Appendix – Online/Hybrid courses

### Basic Course (8 hours)

The basic course is open to all FIDE licensed arbiters.

#### *Prerequisite:*

- Computer, software and network connexion, ready for the course,
- Technical skills to operate a computer in online context.

#### *Training content:*

- Online/Hybrid Chess regulations, the role and responsibilities of a match arbiter
- Zoom supervision, a practical training
- Hybrid Chess supervision, the local chief arbiter
- Online platforms, general concepts, fair play and basic tools to operate

#### *Seminar fees:*

- 30€ per participant

### Advanced Course (8 hours)

The advanced course is open to all FIDE licensed arbiters who have followed the basic course or have officiated in at least 2 Continental or World online events as an arbiter.

#### *Prerequisite:*

- Same technical prerequisite as for the *Basic* course,
- Attendance at the *Basic* course

#### *Training content:*

- Case studies, management of online/hybrid tournaments (incl. pairing, start of games etc.)
- Fair play, what a chief arbiter has to know
- Certification, exam on online/hybrid arbiters

#### *Seminar fees:*

- 30€ per participant (10€ discount when a participant attends both basic and advanced courses)

### Certification

An exam is scheduled at the end of the advanced course.

The objective is to certify that the arbiter:

- Has a proper knowledge of the online/hybrid chess regulations,
- Understands the roles in online/hybrid tournaments,
- Is capable to act as a *Zoom* Arbiter in online events,
- Is capable to act as a Local Chief Arbiter in hybrid events,
- Is capable to run an online/hybrid event as the Chief Arbiter

Candidates passing the exam will receive an official certificate from FIDE.

Depending on the demonstrated skills, we may design different levels of certificates to better reflect reality (e.g. if the arbiter is highly capable of supervising games, but failed in more complex tasks devoted to the chief arbiter).

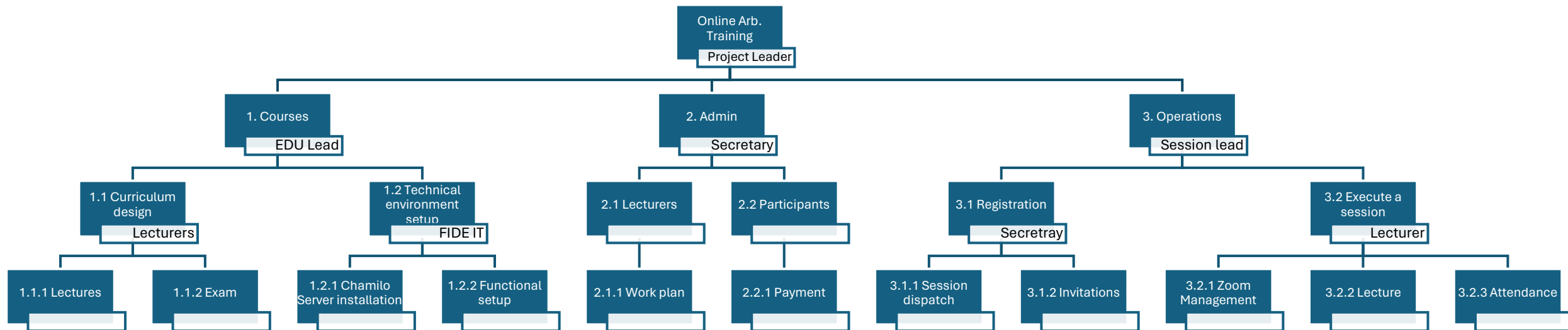
# Phase 2: Project Planning

- Technical requirements of the project
  - How do you split your project into smaller units?
- Project roadmap
  - Helicopter view on the major elements of your project: milestones, deliverables, planned timeline ...
- Adapt your tools to the needs of your project – scheduling
  - In most cases, a calendar view of tasks & milestones in a spreadsheet is largely enough (don't forget dependencies though)
  - When dependencies, detailed progress tracking and resource usage play an important role in your project, you may want to use a Gantt chart with a project management software

# WBS – Work Breakdown Structure

## Splitting your project into smaller units

- A work breakdown structure (WBS) is a visual, hierarchical and deliverable-oriented deconstruction of a project.



# Project scheduling

Small/medium projects, a spreadsheet is OK

START

END

Project actors availability / Resource planning

Preparation steps

Execution steps





# Communication plan

## *Illustration: Using website news for comm.*

- Anticipate
  - What you want to share
  - When it is best to communicate
- A basic *When / What / Why* table can help you structure your communication plan
  - Add a “*How*” if using multiple channels
- Consider this as an iterative/incremental approach
  - Add new items as appropriate

Date	Post	Highlight
24/03/2021	Initial Announcement	Official message to feds
09/04/2021	First 5 sessions planned	Technical message with participants
12/04/2021	Our team	The team
15/04/2021	Session 01 ended	31 participants = 31 federations
22/04/2021	Session 02 ended	Chamilo
25/04/2021	Session 03 ended	Workplaces
29/04/2021	Session 04 and 05 ended	First 150
06/05/2021	Sessions 08 and 09 ended	Certificates
09/05/2021	Sessions 06 and 07 ended	Flexibility of calendar
13/05/2021	Sessions 10 and 11 ended	3 per day !
16/05/2021	Session 12 ended	Hybrid pictures
20/05/2021	Session 13 ended	Surveys = feedback for improvement
30/05/2021	Sessions 14 and 15 ended	On the way to advanced course
10/06/2021	Session 16 + Advanced 1	Let's goooo ! Chief arbiters
17/06/2021	Advanced 2 + 3	Newbie/Techie/Tradi/Ready
20/06/2021	Session 17 + Advanced 4	500 / 142
24/06/2021	Advanced 5	Mindset = lead and understand vs learn and apply
01/07/2021	Advanced 6	Final stretch - Preparing the exam
08/07/2021	Advanced 7a + 7b	Thanks
	Exam / Conclusion	500 - Sonja / Laurent / Dana interview?

# Phase 3: Project execution

- Do the actual work
- Ensure coordination of the team
  - Collaborative tools
  - Visibility of the various components of the project
- Monitor the progress of the project

# Secure your deliverables

- De-De-De:
  - Define your deliverable
    - *A 4 x 2 hours training session*
  - Describe the individual chunks
    - *Lecture 1: Introduction*
    - *Lecture 2: ...*
  - Detail, to facilitate execution
    - Here, the detailed expected content, so that the lecturers may know what topics they have to create
- As usual: be simple but try to find a useful format for your own project

Module	Time	Duration	Read the regulations Connect to Chamilo
<b>Lecture 1 - Introduction to Online Arbiters, roles, processes and tools</b>			
Basic	H0	10	Intro - Program/Agenda/Lecturers/Objectives/Documents/Tools
			Understanding the concepts and roles: On the player side - Playing Zone - Videoconferencing On the arbiter side - Communication tools (Slack/whatsapp/Wechat) - Monitoring tools (google sheets)
	H0+10	20	
	H0+30	10	"small game" + quick Q&A
			Playing Zone = What is an online platform? check list about platforms (comparison of features) Nickname real name etc Corresponding regulations
	H0+40	20	
			Videoconferencing features (webcam, share screen, chat ...) Why to use such a system ? --> Fair play
	H0+60	20	
			Practical needs for Online arbiters: - Communication --> best practices on Slack/Whatsapp ... - Show various examples of monitoring sheets and expected actions from the Chief with the Zoom arbiters
	H0+80	20	Illustrate with "priorities" & behaviour
	H0+100	10	"small game" + quick Q&A
	H0+110	10	Wrap up of the day
	H0+120	0	End of session
Homework = practical case study			
<b>Lecture 2 - FIDE Online Tournament regulations and supervision</b>			
Basic	H0	10	Online Tournament regulations - introduce participants to the document (TOC)
			Case study - Role of the Chief Arbiter - Role of the Online Arbiter - Platform controls (eg draws, wins) & arbiter over-rule - <b>disconnection</b> Scenario over 2-3 rounds, mix of positive and mistakes
	H0+10	40	Participants should react to them
	H0+50	10	Wrap up case study
			Supervision: - Light supervision - Full supervision
	H0+60	10	
			Disconnections - Local regulations: time to reconnect etc - Communication - Escalation - Extreme situation = exclusion
	H0+70	10	
	H0+80	10	Players behaviour
	H0+90	20	"small game" disabled/assistant + quick Q&A
	H0+110	10	Wrap up of the day
	H0+120	0	End of session

# Phase 4: Project monitoring

- Runs in parallel of Phase 3, by nature
- Identify what helps you best to monitor your progress:
  - The number of registered participants in the seminar you organize
  - The percentage of success

# Monitoring: Budget oriented view

## FIDE Arbiters' Commission - Training Programme for Online/Hybrid Arbiters - Financial Summary

Basic		Attendance			Income				Expense							Balance	
Session	Dates	Registered	Attended	Certificates	FIDE	Federation	Individual	Total	Lect. Bayat	Lect. Freyd	Lect. Marghetis	Lect. McFarlane	Lect. Salama	Total Lect.	Admin. Baralic	Total	Total
Basic 01	12-15 Apr. 2021	31	31	31	930€	0€	0€	930€	200€	200€	200€	0€	200€	800€	50€	850€	80€
Basic 02	19-22 Apr. 2021	28	28	28	840€	0€	0€	840€	200€	200€	200€	0€	200€	800€	50€	850€	-10€
Basic 03	24-25 Apr. 2021	31	31	31	930€	0€	0€	930€	200€	200€	200€	0€	200€	800€	50€	850€	80€
Basic 04	26-29 Apr. 2021	28	28	28	840€	0€	0€	840€	0€	400€	400€	0€	0€	800€	50€	850€	-10€
Basic 05	26-29 Apr. 2021	32	32	32	960€	0€	0€	960€	400€	0€	0€	0€	400€	800€	50€	850€	110€
Basic 06	01-09 May 2021	30	28	28	840€	0€	0€	840€	0€	400€	400€	0€	0€	800€	50€	850€	-10€
Basic 07	01-09 May 2021	32	29	27	870€	0€	0€	870€	400€	0€	0€	0€	400€	800€	50€	850€	20€
Basic 08	03-06 May 2021	31	28	28	360€	390€	90€	840€	400€	400€	0€	0€	0€	800€	50€	850€	-10€
Basic 09	03-06 May 2021	29	26	26	300€	420€	60€	780€	0€	0€	400€	0€	400€	800€	50€	850€	-70€
Basic 10	10-13 May 2021	29	29	29	90€	540€	240€	870€	0€	800€	0€	0€	0€	800€	50€	850€	20€
Basic 11a	10-13 May 2021	31	30	30	30€	840€	30€	900€	0€	0€	0€	0€	800€	800€	50€	850€	50€
Basic 11b	10-13 May 2021	30	29	29	300€	450€	120€	870€	0€	800€	0€	0€	0€	800€	50€	850€	20€
Basic 12	15-16 May 2021	30	30	30	60€	570€	270€	900€	800€	0€	0€	0€	0€	800€	50€	850€	50€
Basic 13	17-20 May 2021	31	27	27	90€	600€	120€	810€	0€	0€	400€	0€	400€	800€	50€	850€	-40€
Basic 14	22-30 May 2021	27	23	22	60€	600€	30€	690€	800€	0€	0€	0€	0€	800€	50€	850€	-160€
Basic 15	22-30 May 2021	30	26	26	90€	450€	240€	780€	0€	0€	0€	0€	800€	800€	50€	850€	-70€
Basic 16*	07-10 Jun. 2021	23	21	20	270€	240€	120€	630€	0€	560€	0€	0€	0€	560€	35€	595€	35€
Basic 17*	19-20 Jun. 2021	20	19	19	120€	240€	210€	570€	560€	0€	0€	0€	0€	560€	35€	595€	-25€
<b>Total</b>		<b>523</b>	<b>495</b>	<b>491</b>	<b>7,980€</b>	<b>5,340€</b>	<b>1,530€</b>	<b>14,850€</b>	<b>3,960€</b>	<b>3,960€</b>	<b>2,200€</b>	<b>0€</b>	<b>3,800€</b>	<b>13,920€</b>	<b>870€</b>	<b>14,790€</b>	<b>60€</b>
%		100%	95%	94%	54%	36%	10%	100%									

KPI  
Attendance / success  
rate

Financial monitoring:  
IN / OUT / Balance

# Monitoring: KPIs

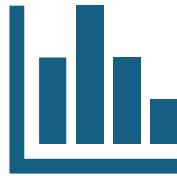
- In our example, 2 slots per federation were sponsored by the FIDE Development fund
- Importance to follow the KPIs, to evaluate the impact of the project/sponsorship initiative:
  - Attendance per federation
  - Grouped by zones here

Continent	Zone	Slots	Registered	Attended	Skipped	Additional	Attended
<b>All</b>	<b>All</b>	<b>390</b>	<b>276</b>	<b>257</b>	<b>14</b>	<b>306</b>	<b>241</b>
<b>Africa</b>	<b>Total</b>	<b>98</b>	<b>62</b>	<b>59</b>	<b>4</b>	<b>27</b>	<b>16</b>
Africa	4.1	12	12	12	0	3	3
Africa	4.2	22	12	10	2	2	1
Africa	4.3	16	2	2	0	0	0
Africa	4.4	28	16	16	2	7	5
Africa	4.5	20	20	19	0	15	7
<b>America</b>	<b>Total</b>	<b>78</b>	<b>57</b>	<b>55</b>	<b>5</b>	<b>52</b>	<b>44</b>
America	2.1	2	2	2	0	11	9
America	2.2	2	2	2	0	12	12
America	2.3.1	2	2	2	0	6	5
America	2.3.2	12	8	8	2	8	3
America	2.3.3	2	2	2	0	0	0
America	2.3.4	2	1	1	1	0	0
America	2.3.5	40	24	22	2	12	12
America	2.4	8	8	8	0	1	1
America	2.5	8	8	8	0	2	2
<b>Asia</b>	<b>Total</b>	<b>104</b>	<b>70</b>	<b>59</b>	<b>4</b>	<b>66</b>	<b>43</b>
Asia	3.1	26	23	19	3	13	7
Asia	3.2	12	8	7	0	6	4
Asia	3.3	34	18	15	0	21	18
Asia	3.4	12	6	6	0	5	1
Asia	3.5	2	2	2	0	6	2
Asia	3.6	16	11	8	1	8	4
Asia	3.7	2	2	2	0	7	7
<b>Europe</b>	<b>Total</b>	<b>110</b>	<b>87</b>	<b>84</b>	<b>1</b>	<b>161</b>	<b>138</b>
Europe	1.1a	8	4	4	0	1	1
Europe	1.1b	6	6	6	0	1	1
Europe	1.1c	6	6	5	0	27	23
Europe	1.2a	8	6	6	0	38	35
Europe	1.2b	10	8	8	0	7	6
Europe	1.3	10	10	10	0	11	10
Europe	1.4	12	12	12	0	19	17

# Phase 5: Project closing



**Deliverables are finished**



**Final report**

Internal  
Financial



**Reflection meeting**

Key learnings

# Final report

## *Illustration PDC*

- In the case of sponsorship/grants, you may requested to use some predefined reporting templates
  - e.g. PDC Appendix D1/D2 for funding report
- Respect deadlines, format and expected elements
  - Easier for the funding entity to review
  - Better for the evaluation of your reliability



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### APPENDIX D/2 - FINANCIAL REPORT FORM

FIDE DF beneficiary to complete and submit to the [fedfunding@fide.com](mailto:fedfunding@fide.com)

Together with Appendix D/1 - FUNDING REPORT FORM

BENEFICIARY NAME:	
DEVELOPMENT LEVEL:	
PROJECT NAME:	
PROJECT START DATE:	
PROJECT END DATE:	
YEAR OF CONTRIBUTION:	

#### FIDE DEVELOPMENT FUND

Currency	Amount
EUR	XXXX

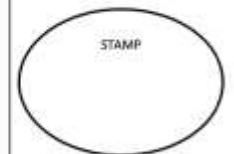
#### ACTIVITY/PROJECT EXPENDITURES DETAILS

Date	EXPENSES - Supplier/Beneficiary Name - Invoice No. (if not available any identification no.) - Type of expense, period, etc.	Covered? Mark Yes for expenses covered by FIDE DF	Amount in original currency		Amount in currency of FIDE DF
			Currency	Amount	EUR
XX.XX.XX	Please fill in here	select	select currency	XXXX	XXXX
XX.XX.XX	Please fill in here	select	select currency	XXXX	XXXX
Total expenditures (in currency of FIDE DF)				EUR	-

We certify that the information provided in this report is accurate and represents a true and fair summary of the expenditures related to the project/activity above

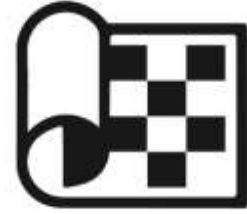
At any moment, we will provide documentations and justifications related to the project/activities/expenditures as required by FIDE or by its auditors, upon requests of FIDE

President/General Secretary Signature: _____  Function: Name: _____	Treasurer/Head of Finance Signature: _____  Function: Name: _____
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Place: \_\_\_\_\_ Date: \_\_\_\_\_





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## Conclusion

- Consider the project from A to Z: don't focus only on phase 3 (exécution)
- Anticipate the formalisation of the project, even if the exécution start date is in several months
- Use tools that are relevant to you for a more meaningful approach in general

