2.7 Project Management

Description:

This tool provides the steps to successfully manage a project, and a template for assessing variance in cost and time.

How it can be used:

In organizations, project management can refer to anything in any area or function which needs planning and managing. Successful project management, for projects large or small, tends to follow a fairly structured process. Follow the steps below to approach project management in an organized manner and ensure a successful outcome for projects in your organization.

Project Management Steps

1. Create the project specifications.
    a. Outline the specifications to provide a framework for keeping the project on track.
    b. Describe purpose, goals and deliverables.
    c. State parameters (e.g., timelines, budgets, range, scope, location, authority).
    d. Outline the people involved and the way the team will work (e.g., frequency of meetings, decision-making process).

2. Plan the project.
    a. Appoint the team early to maximize its ownership and buy-in to the project. Gain commitment from your team members.
    b. Create a project definition statement which will help prevent you from going beyond the scope of the project.
    c. Identify in detail what will and will not be included in the project scope.
    d. Identify activities and establish relationships and links between various activities. Complex projects will have a number of activities running in parallel. Some parts of the project will need other parts of the project to be completed before they can begin or progress. Such 'interdependent' parts of a project need extra consideration and planning.
    e. Establish a milestone plan which describes what, when and how various elements will be measured.
    f. Identify key roles and responsibilities for all team members.
    g. Create a spreadsheet to plan and report on expenditures. The spreadsheet must enable you to plan, administer and report on the detailed finances of your project.
    h. Identify all stakeholders and consider how to best consult and involve them in the project.
    i. Create a risk analysis plan and conduct a high level analysis at this early stage. Avoid going into great detail; instead focus on an overview that identifies the key risks.
    j. Create a contingency plan to anticipate and respond to unexpected circumstances.
    k. Consider which tools you will need. At a minimum, incorporate a Critical Path Analysis to show the order in which tasks must be performed and the relative importance of tasks. Although some tasks appear insignificant, they may actually be influential in enabling much bigger activities to proceed. Additional helpful tools are Brainstorming, Fishbone Analysis, and Gantt Charts.

3. Plan to communicate.
    a. Effective communication serves two purposes; to inform people and to obtain essential support, agreement and commitment.
    b. If your project is complex and involves a team, you should involve the team in the planning process to maximise buy-in, ownership, and accountability.
    c. Create a communication plan that identifies objectives, timelines, channels, roles and responsibilities.

Source: First Nations Health Managers Association. *Knowledge Circle*. www.fnhma.ca.

d. Consider how best to communicate your project goals and process to those within your organization and other stakeholders. Involvement and communication are vital for cooperation and support. Failing to communicate to people (who might have less valuable input, but whose cooperation is crucial) is a common reason for arousing suspicion and objections, defensiveness or resistance.

4. Initiate project activities.
   a. Based on your Critical Path Analysis, create a work breakdown structure (WBS) for the project. It will list all the activities you will need to undertake to deliver the project.
   b. Estimate how long each activity will take.
   c. Clarify all roles and responsibilities for each activity. Activities need to be very clearly described, including all relevant parameters, timelines, costs, and deliverables.
   d. Delegation is vital for successful project management involving teams. Distribute the full plan to the team and consider how to delegate medium- and long-term tasks. Long-term complex projects need to be planned in more detail. Only delegate tasks which pass the SMART test (Specific, Measurable, Achievable, Realistic, Time-based).
   e. Revise the project Critical Path Analysis if necessary.
   f. Update on progress through meetings; communicate progress and successes regularly to everyone.
   g. Review your communication plan regularly.

5. Monitor and measure progress.
   a. Based on the milestone plan, review whether activities have been delivered on time. Be clear on what needs to be achieved to deliver the next milestone.
   b. Check the progress of activities against the project plan.
   c. Adjust the plan if necessary in light of performance, changing circumstances, and new information, but remain on track and within the original terms of reference.
   d. Be sure to use transparent, pre-agreed measurements when judging performance.
   e. Identify and delegate new actions as appropriate.
   f. Inform team members and those in authority about developments, clearly, concisely and in writing.
   g. Plan team meetings to review progress.
   h. Develop an issues log to record items that may be causing concern.
   i. Carry out a full risk analysis. Regularly review each risk to ensure it is being managed. If necessary, assign people to manage the various risks.
   j. Incorporate a 'Planned vs. Actual' form which allows you to monitor how you are progressing with specific tasks. Link these forms into milestone reviews. (Template attached)
   k. Appoint someone to be responsible for project quality, especially in larger projects.
   l. Communicate as per the communication plan (e.g., one-page reports highlighting milestones and key issues, weekly update emails).

6. Complete the project
   a. At the end of your project hold a final assessment meeting with the team to review your project plan. Focus your meeting on learning and identifying what you can use on the next project.
   b. Reflect on successes gratefully and realistically. Reflect on any failures and mistakes positively, objectively, and without assigning personal blame.
   c. Explore how well you managed the risks and engaged the stakeholders.
   d. Write a review report; make observations, provide recommendations and describe next steps regarding follow-up issues and priorities. Circulate to all relevant stakeholders.

'PLANNED' VERSUS 'ACTUAL' TEMPLATE

Activity	Planned time	Actual time	Difference/ Notes	Planned cost	Actual cost	Difference/ Notes
Example: *Develop maternal exercise program*	*2 days*	*4 days*	*Required extra consults with Elders and pregnant mothers*	*$2000*	*$2500*	*Extra costs related to Elders' meeting (travel, honoraria, food)*

Source: First Nations Health Managers Association. *Knowledge Circle*. www.fnhma.ca.