



How to ...

Plan and Manage a Project

Project management is the practice of initiating, planning, executing, controlling, and closing the work of a team to achieve specific goals and meet specific success criteria over a specified time period.

In this guide we will seek to look past the jargon and to equip you to successfully deliver a project in your parish or context. Projects vary hugely in their size and complexity and project management is an accredited profession which reflects this. Our intention here is to appropriately simplify for you the process of planning and managing a project, whilst ensuring that the benefits of good project management are retained.

If you require any support in planning or managing your project, or would like to speak to someone regarding using the templates attached to this guide, please contact Chris Priddy chris.priddy@bristoldiocese.org

SECTION 1 : Projects

A project is a vehicle of change within an organisation. It is not a repetitive activity, but rather happens once, to fulfill a specified brief, over a set time period, with a fixed budget, to bring about defined benefit(s) through a set of outputs or deliverables, where there are identified risks and stakeholders that need to be managed.

For example; installing a new PA system in the church would be a project; it happens once, the planning and installation process takes six months and the system improves the audio quality of church services for the congregation. Using the PA system week by week is not a project, but simply part of 'usual activity' in the life of the church.

In the above example:

The 'brief' is the plan for installing a new PA system, it will include input from those who will use and benefit from the system and details regarding why this is being done and for what effect.

The 'outputs/deliverables' of the project is the PA system being installed – the *things* that the project has created that represents a change to what was there before.

The 'benefits' of the project is the improved audio quality for those attending church services. A benefit is something which is felt or experienced by someone encountering the project 'outputs'.

Good project management should ensure that the project successfully delivers the brief with its intended outputs, on time, to budget with positive engagement with key stakeholders.

SECTION 2 : Roles and responsibilities within projects – who does what?

There are a few key roles that are important for the successful delivery of a project. It is important that each person understands their role and responsibilities within the project.

Project Manager : The Project Manager is responsible for the management of the project. They may liaise with external partners or contractors for the delivery of the different elements of the project and will be responsible for monitoring the progress of the project through time, plan and

budget to meet the specified brief. Failure to successfully manage the project could result in the failure of the project to deliver its outputs to the plan and brief. The Project Manager is accountable to the Sponsor and reports to the Project Board.

Sponsor : The Sponsor is responsible for ensuring that the project delivers its intended benefits to the Users. They support the Project Manager in liaising with Stakeholders and Users, dealing with issues and considering changes to the project. The Sponsor is the nominated representative of and accountable to, the Project Board.

Project Board : The Project Board meets regularly to review the progress of the project, authorise changes to the project and appropriately support the Project Manager and Sponsor.

Stakeholders : Are individuals, groups of people and organisations that have an interest in, are affected by or have influence within the project. Each Stakeholder will experience the benefits and disbenefits of a project differently and need to be engaged with to ensure they are informed, consulted, involved or partnered with as appropriate.

Users : These are the people who will experience the benefits that the project delivers. They should be involved in the design of the brief for the project and consulted regarding any changes that are made during the project. The users will likely be a key stakeholder in your project, failure to involve and consult the users could result in the successful delivery of a project, but one which does not actually meet the needs of the users and therefore fails to solve the problem it was commissioned to address.

SECTION 3 : Process - A guide to managing projects

From concept to completion – a process for your project

Project Planning

- Use the Project Plan to consider the need, brief, approach, milestones, outputs, success measures and governance setup of your project.
In any project there will be multiple options – different ways to achieve the intended benefits. Each option will have many different pros and cons associated with it. The Project Board and Sponsor should assist the Project Manager, with input from the Users, in deciding which option to pursue and the Project Plan should detail how this option will be delivered through the project.
- Record any dependencies the project may have in the Project Tracker as you will need to be aware of these as your project progresses.
- Once the Project Board have agreed the Project Plan, additional planning work can be done. The Project Manager should develop the: Project Timeline, Risk Register, Stakeholder Engagement Plan, Communications Plan and Budget. Templates for these have been provided.

Project Delivery

- Once the Project Board have agreed this set of documents the project can begin.
- During this phase use the Project Tracker to record any issues, changes, learning or dependencies that are part of your project or that arise during this phase.
- Keep the project documents regularly reviewed and up to date.
- Use the Project Highlight Report to provide regular updates to the Project Board.
- Meet regularly with the Sponsor and Project Board.
- If changes need to be made to the project, remember to review these with the Users and record them in the Project Tracker.

- If issues arise during your project, remember to record these and the actions taken as a result in the Project Tracker.
- If learning occurs during the project, remember to record this in the Project Tracker so that it can be reported in the End of Project Review and used to influence the delivery of future stages of this project.
- Follow the Project Plan to deliver the project as designed.

Project Completion

- Once the project has been signed off as complete by the Project Board, use the Project Review form to review the project and record any points of learning.
- The project and its outputs are now handed over to the Users who will now experience and make use of the benefits it has delivered.

Governance and monitoring for your project

Establishing a Project Board (which may be a sub-committee of your PCC) is important for the successful governance of your project. This small group of people is responsible for monitoring and supporting the progress of your project and should be chaired by the Sponsor.

The Project Board should receive Highlight Reports from the Project Manager ahead of their meetings, these reports chart the projects progress, raise issues, highlight risks and are a mechanism for the Project Manager to seek support and decisions from the Project Board.

Your Project Plan and Project Timeline may include key milestones for the delivery of your project. These markers in time, stating that specific component parts of the project should be completed at specific points within the project allow the Project Board to see whether the project is on track and progress against these milestones should be reported to the Project Board. These milestones enable the Project Manager to split the project down in to parts, phrases or sections to be delivered in sequence leading to the successful completion of the project.

For example: Removing the old PA system, installing wiring, installing speakers, installing the sound desk and system setup, may all be milestones within the project with completion dates attached to each one. Delay within one milestone may have an impact on the expected completion date for the next.

Your Project Plan may include lead measures, these are the measures that indicate whether a project is on track and likely to deliver its benefits – the Lag Measure. There is always a delay on knowing whether a lag measure has been achieved or not, therefore a lead measure is something which is influenceable and a good indicator of whether the Lag measure is likely to be achieved. Monitoring the lead measures within your project will give the Project Board an effective way to know whether the project will deliver its benefits to time, budget and brief.

For example, while you can't control how often your car breaks down (a lag measure), you can certainly control how often your car receives routine maintenance (a lead measure). And the more you act on the lead measure, the more likely you are to avoid the roadside breakdown.

What leads to success? – Some best practice tips

- Maintain regular contact between Project Manager and Sponsor.
- Hold regular Project Board meetings which are focused around making decisions and supporting the Project team, not simply receiving an update on the detail of everything that has been done relating to the project.
- Ensure good, honest, transparent reporting of progress.
- When procuring goods and services obtain three quotes.
- During the planning stages speak to others who have run similar projects in the past and adopt their relevant learning points.

- Make use of the set of templates that are available with this guide.
- Successfully delivering a project is a balance between the time, the cost and the benefits. When issues arise and changes or compromises need to be made this will affect one or more of these three elements – there may be a delay, the cost may increase or the expected benefit derived by the project may be reduced. Knowing which of these three elements is most important to your project will help you to know how to make mid-project adjustments.

For example; if the project has a fixed deadline for delivery, because perhaps a dignitary has been booked for the Grand Opening, then you may be willing to overspend on the budget in response to an issue in order to meet that deadline. Alternatively, if the budget is most important, then you may choose to only produce $\frac{3}{4}$ of the projects outputs, thus reducing the benefits derived by the project, in order to ensure that the project was delivered on budget.

SECTION 4 : What does GREAT look like?

GREAT Project Planning...

- Begins with an understanding of the end Users needs, a well-managed, successful project which delivers something that doesn't meet the Users needs, is not in fact a successful project;
- Considers multiple ways of achieving the desired benefits before deciding upon the best option to proceed with;
- Invests time in the planning process, time spent planning how the project will be delivered, what the risks are, who the stakeholders are and what the milestones will be will pay dividends as the project progresses;
- Revisits plans and project documents as the project progresses to ensure that they are active, accurate, up to date and continue to support the successful delivery of the project. Planning documents are never static but evolve and develop as the project progresses.

GREAT Project Managers...

- Are clear on the requirements of the users and how the project will deliver its benefits;
- Understand the Project Plan and work to deliver the project to time, budget and brief;
- Work collaboratively with others for the benefit of the project and are strong team builders;
- Liaise closely with the Project Sponsor discussing the projects progress, tacking issues, managing risks and engaging with Stakeholders;
- Closely monitor the progress of the project and report this honestly to the Project Board;
- Are clear on what success looks like for the project.

GREAT Sponsors...

- Understand the vision for the project and the change it is seeking to achieve;
- Support the Project Manager;
- Are active in engaging with and listening to Stakeholders;
- Chair the Project Board meetings effectively.

GREAT Project Boards...

- Hold the Project Manager and Sponsor to account;
- Support the successful delivery of the project;
- Make clear decisions as requested by the Project Manager and Sponsor;

- Rely on the Project Plan and don't get drawn in to adjusting minor points of detail through the life of the project.

GREAT stakeholder engagement...

- Begins with an analysis of Stakeholders and the production of a Stakeholder Engagement Plan;
- Seeks to understand the current position of Stakeholders in relation to the project, where the project needs them to be and how engagement can be deployed to enable that move.
- Involves high levels of listening and clear communication;

GREAT measures and monitoring...

- Starts with identifying the measures by which the success of the project will be judged – the Lag Measures.
- Involves identifying good lead measures – things which are influencable through the lifespan of the project and which are good indicators of achievement of the lag measure. These are the measures of the things which lead to success.
- Requires systems to be set up to capture, record and monitor those measures, this could be a spreadsheet, a graph, a tick list or other method;
- Involves regular, honest and transparent reporting of progress to the Project Board.

SECTION 5 : Tools and templates for managing projects

As appendices to this guide you will find the following templates. Each of the templates will help you to plan, manage and deliver a different aspect of your project. It is recommended that you make use of them all, but you may find that certain elements are not applicable or helpful to your project, in which case by-pass that element. This set of documents should serve you to effectively manage your project and not simply be seen as a paper-pushing exercise.

Each template is either self-explanatory as you follow it through, or includes notes about how to use and get the most out of it within the template itself.

Project Plan	Use this document to help you to plan your project, what it seeks to achieve and how it will be managed. This plan will include the 'Brief'.
Project Timeline	Use this spreadsheet to plot the key elements and stages of your project over a period of time.
Risk Register	Use this spreadsheet to record any risks identified for your project and to consider how you might mitigate against these.
Stakeholder Engagement Plan	Use this spreadsheet to consider who the main stakeholders are for your project and how you may need to engage with them.
Communications Plan	Use this spreadsheet to plan the communications that will need to be undertaken as part of your project.
Budget	We have not provided a template for budget planning as the structure of the budget for every project will be different. It is however a key document associated with every project.
Project Tracker	Use this spreadsheet to record any issues, changes, learning or dependencies that are part of your project or that arise through the lifespan of your project.
Project Highlight Report	Use this spreadsheet to produce a short report charting the progress of your project to be shared with your oversight group.
End of Project Review	Use this spreadsheet to produce a report at the end of your project recording the success of the project and any learning that may be useful for future project.
Funding Tracker	Use this spreadsheet to keep a record of potential funders and applications made.