



Putting the Q into quality project management

Dr Bill Lockitt

Funded by:



Leading learning and skills



Putting the **Q** into quality project management

Dr Bill Lockitt

Funded by:

Published by the Learning and Skills Network

www.LSNeducation.org.uk

LSN is committed to providing publications that are accessible to all. To request additional copies of this publication or a different format, please contact:

Information and Customer Centre
Learning and Skills Network
Regent Arcade House
19–25 Argyll Street
London W1F 7LS.
Tel 020 7297 9144
Fax 020 7297 9242
enquiries@LSNeducation.org.uk

Registered with the Charity Commissioners

Copy editor: Susannah Wight
Designer: Joel Quartey
Printer: Impress, Gillingham, Kent

072806GR/05/07/1200

ISBN 01-84572-437-2

© Learning and Skills council 2007

You are welcome to copy this publication for internal use within your organisation. Otherwise, no part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, electrical, chemical, optical, photocopying, recording or otherwise, without prior written permission of the copyright owner.

Further information

For further information about the issues discussed in this publication please contact:

Geoff Foot
Programme manager
Learning and Skills Network.
Tel 02920 619172
gfoot@LSNeducation.org.uk

This publication was supported by the Learning and Skills Council as part of a grant to the Learning and Skills Network for the adviser and practitioner training for the e-learning professional development framework.

Contents

About the author

Preface

Section 1	Introduction and overview	1
1.1	Who should use this publication?	1
1.2	What is an e-learning project?	2
1.3	What are Q projects?	2
1.4	Why take on a project?	3
1.5	Duties of the project manager	6
1.6	What makes a good project manager?	7
1.7	Estimating the cost of a project	8
1.8	Selecting a project team	10
1.9	Formalising internal and external partnerships	11
1.10	Time management	12
1.11	Single point accountability	12
1.12	The initial team meeting	13
1.13	Team management	14
1.14	Project management software	15
Section 2	Starting a project	17
2.1	The business case	17
2.2	Planning a project	18
2.3	Risk management	20
2.4	Contract management	21
2.5	Measurable performance criteria	21
2.6	The role of the project manager	21
2.7	Team selection and building	23
Section 3	Managing a project	25
3.1	What is project management?	25
3.2	Monitoring progress	26
3.3	Managing change	27
3.4	Managing a steering group	31
3.5	Managing stakeholders	32
3.6	Managing customer satisfaction and expectations	32

Section 4	Closing a project	35
4.1	Reasons for closing the project	35
4.2	The post implementation review	36
4.3	Measuring success	37
4.4	Disseminating success	37
Section 5	Q project tips	39
5.1	Questions to ask when taking on a project	39
5.2	Saying 'no' to a project	45
5.3	Planning your project	49
5.4	Managing your project	55
5.5	Monitoring your project	59
5.6	Getting your project back on track	63
5.7	Closing the project	65
5.8	Disseminating your project outcomes	69
Section 6	Staff development exercises	71
6.1	Identify your institutional project management model	71
6.2	Successful project management	71
6.3	Identify the benefits	72
6.4	Develop your systems	72
6.5	Discover good practice	72
6.6	Estimating costs	72
6.7	Identifying the project team	73
6.8	The team service level agreement	74
6.9	Developing objective performance criteria	74
6.10	Identifying time management issues and solutions	74
6.11	Team management	74
6.12	The final project report	75
6.13	Advantages and disadvantages of project management software	75
6.14	Project management software cost–benefit analysis	75
6.15	Change management	75
Appendix	Mapping this publication to the ePD framework and PRINCE 2 methodology	77
	Web links	80
	Bibliography	82
	Glossary	83

About the author

Dr Bill Lockett – Managing Director 12watchconsultancy/QTP Limited

Prior to becoming Managing Director of QTP Ltd and 12 Watch Consultancy, Bill managed Post-14 developments within 3T Productions, part of the Research Machines (RM) group. Before joining RM Bill spent three years developing e-learning as part of the government's learndirect and UK online initiatives run by Ufi. Prior to this he managed part of the Quality in Information and Learning Technology (QUILT) initiative and produced a number of publications for the Learning and Skills Development Agency (LSDA, now LSN). Bill developed innovative multimedia, flexible and open learning delivery methodologies and systems as part of an Esmee Fairbairn Fellowship and completed a PhD entitled 'The effective integration and management of information communication technology within further and adult education delivery methodologies' in May 2001. Bill is a qualified PRINCE 2 registered practitioner and has managed a range of ILT/ICT and e-learning related projects within business, education and training within the private and public sector.

Bill became managing director of 12 Watch Consultancy and QTP Ltd in 2005 and works as a private consultant to develop the effective use of new technology in education, training and business.

Contact:

bill@12watchconsultancy.co.uk

www.12watchconsultancy.co.uk

Preface

This publication has been jointly funded by the Centre for Excellence in Leadership (CEL) and the Learning and Skills Network (LSN).

CEL sees good project management as key to the implementation of e-learning projects, both small and large, and this is increasingly important in modern learning organisations where distributed leadership is the norm. We see the tools and guidance available in this publication as useful to all those looking to embed their e strategy and will be a beneficial aid to those undertaking CEL programmes such as eQuIP, eXplorer, Connect and Realise.

The Learning and Skills Network (LSN) has a tradition of supporting the e-learning professional development of sector staff by encouraging and funding a range of development projects. Beginning with the QUILT projects in 1997, the former LSDA and the LSN have offered involvement in projects of all shapes, sizes and costs, which are intended to help staff to integrate and improve their use of information and learning technology (ILT) or e-learning. Details of all the projects and examples of the various outcomes and outputs can be found at www.learningtechnologies.ac.uk/projects.asp?area=6

One recent example was the Q projects, which is widely regarded as a successful, innovative but quick and easy method of introducing staff to the potential of ILT in teaching and learning. The aim of the projects was to produce a more sustainable approach to future teaching and learning strategies. Q project funding paid for cover for staff who were undertaking a project, and enabled them to gain ILT skills. The title 'Q' and the format of the projects was based on Module Q of the Lifelong Learning UK (LLUK) e-learning and e-leadership standards relating to staff skills in devising and managing e-learning project activity.

Project management covers a wide range of skills and is one of the best forms of staff development available for the development of skills 'by doing'. LSN has tried to capture these skills in two ways: through dissemination on CD-ROMs and DVDs of project outputs and events, and through the learning technologies website and the @sk Butler search engine (see www.learningtechnologies.ac.uk/ask). Examples of e-learning in action capture effective practice, in the form of the lessons learnt in doing a project, the benefits for the learner and others, plus many other attributes not normally captured in a project report. The examples contain elements required for our professional development related to reflective practice and the process needed to embed quality improvement into our teaching delivery.

This publication builds on the experience gained by staff who have managed such projects with appropriate advice and guidance for the initiated to improve and for the uninitiated who are about to embark on a project. The material within this publication underpins the whole ethos of project management and is a valuable resource for topic 11 of the professional development framework for e-learning (ePD)¹, 'Undertake an e-learning development project' and, where possible, mapping to the PRINCE 2 project management methodology.

1 Link to the support materials for the Professional Development Framework for e-learning: www.learningtechnologies.ac.uk/ecpd/lister

How to use this publication

This publication is for the use of sector staff who are involved in e-learning development projects. Whatever the scale or focus of the development, and whatever the roles otherwise of staff involved, the publication offers practical, tried and tested activities to support successful project outcomes. The first section also helps you to decide who will benefit most from using the publication.

Aims and objectives

The aims and objectives of each section are stated at the start.



Exercises

When you see the symbol shown on the left you need to do some work. Exercises are included at appropriate points throughout the text and are used to enable you to demonstrate your understanding of what has been covered. The exercises will develop your ability to gather and interpret information and use it to address queries and solve problems.

Websites

Website addresses have been included to enable you to find additional information, help and advice relating to the topics covered in publication sections.



Time out

When you see the symbol on the left we are suggesting that you take time out from reading to think about some of the issues being discussed.

Section 1 Introduction and overview

By the end of this section you will be able to:

- identify who should use this publication
- identify the key characteristics of an e-learning project
- identify the key characteristics of a Q project
- give reasons for taking on a project
- understand basic project management concepts.

- 1.1 Who should use this publication?
- 1.2 What is an e-learning project?
- 1.3 What are Q projects?
- 1.4 Why take on a project?
- 1.5 Duties of the project manager
- 1.6 What makes a good project manager?
- 1.7 Estimating the cost of a project
- 1.8 Selecting a project team
- 1.9 Formalising internal and external partnerships
- 1.10 Time management
- 1.11 Single point accountability
- 1.12 The initial team meeting
- 1.13 Team management
- 1.14 Project management software

1.1 Who should use this publication?

This publication has been produced to support practitioners and managers throughout education and training who anticipate involvement in an e-learning/ICT/ILT² project. The pull out sections are there as a quick reference guide. They will help you to understand the basic principles if you are new to project management, and ensure your project gets off to a flying start. The main publication provides more detailed information. Sections can be used in any order as and when required.

² We use the term 'e-learning' most often throughout this publication but the same principles of project management apply whether the focus is e-learning or 'information and communications technology' or 'information and learning technology'

The publication will be of use to individuals with diverse project management experiences and skills, from the novice to the expert, but we assume you want to become a better manager of projects in the future and are willing to experiment with the techniques described in this publication to increase your skills and competences.

1.2 What is an e-learning project?

The focus of this publication is e-learning projects undertaken within education and training environments, for example those that are part of the 'e-learning and technology CPD' Q project initiative (see www.learningtechnologies.ac.uk/eCPD.asp?area=64). However, the techniques discussed are relevant to the successful management of any project and should provide enough information to enable readers to feel more confident about taking on and managing any development projects in the future.

The distinguishing feature of e-learning projects is the use of technology for the improvement of teaching, learning and staff development within education and training organisations.



How would you define an e-learning project that is relevant to your institution?

What sort of e-learning projects have already been undertaken?

How successful were they?

What made them successful?

1.3 What are Q projects?

Q projects were intended to be a quick and easy method of introducing college staff to the potential of e-learning or ILT in teaching and learning, leading to a more sustainable approach to their future teaching and learning strategy. Practitioners were invited to participate in small-scale e-learning development projects. The aim was to pay for the release of time for staff to develop their e-learning skills through action-based projects based on local and national priorities. Colleges could submit one individual application for up to £1000 (and one additional application for up to £1500 as part of a consortium involving two or more colleges).

The framework for these projects was based on Module Q of LLUK's e-learning standards. Some examples of ideas for a Q project include(d):

- integrating e-learning into curriculum delivery
- integrating videoconferencing into teaching and learning
- formative assessment including quizzes, crosswords and games
- integrating video clips, web material, resource materials etc into a structured lesson or for inclusion on an intranet
- developing interactive learning materials.

These examples are merely illustrative and practitioners have produced many other sound ideas. There has been an emphasis on dissemination as well as meeting local or national priorities, and producing transferable outcomes and outputs that can be shared with the sector as a whole.

1.4 Why take on a project?

What is a project?

In its modern form, project management is a relative newcomer to the management scene. Business and industry started to see the benefits of efficient project management in the early 1960s, but the origins of project management can be traced back to the early 19th century, when large-scale 'projects' – the building of railroads, canals, ships, etc – were being undertaken. Managers of these projects faced new problems: they had to deal with large numbers of workers, complicated elements that needed to be completed in sequence, and the logistics of organising workers and resources.

Frederick Taylor (1856–1915) undertook a detailed study of work and showed that it could be broken down into elementary parts and that those elements could be planned and built into the production process.

Henry Gantt (1861–1919), an associate of Taylor, studied the elementary parts in greater detail. One outcome of his work was the introduction of the Gantt chart, which highlighted the sequence and duration of all tasks that in total formed a project. The Gantt chart proved so successful as a project management tool that it remained unchanged for almost 100 years; only recently has it been adapted to show the interdependence of tasks.

Other tools have been introduced, such as project evaluation review technique (PERT) charts and critical path analysis, to improve the 'scientific' approach to project management.

Reasons for taking on a project

You should ask a number of strategic questions before you initiate or undertake a project; even small projects impinge on an institution's normal working practices. Critically, does the project support institutional aims and objectives? The answer to this question should determine whether the project is undertaken. Assuming that the institution has an 'e-learning/ILT/ICT strategic plan', any project that does not fit into that plan and which is detached from 'normal' activity can rarely be integrated into everyday institutional practice.

There may be occasions when projects that do not support the institutional plan are taken on. For example, technology is constantly changing and may overtake the institutional plan. A project concerned with integrating new technology or delivery methodologies could be used to gather data to inform future institutional planning.

A report by the Higher Education Funding Council for England (HEFCE³, 1998) identified some issues to be considered before undertaking such projects. The issues are relevant to users of this publication. For example:

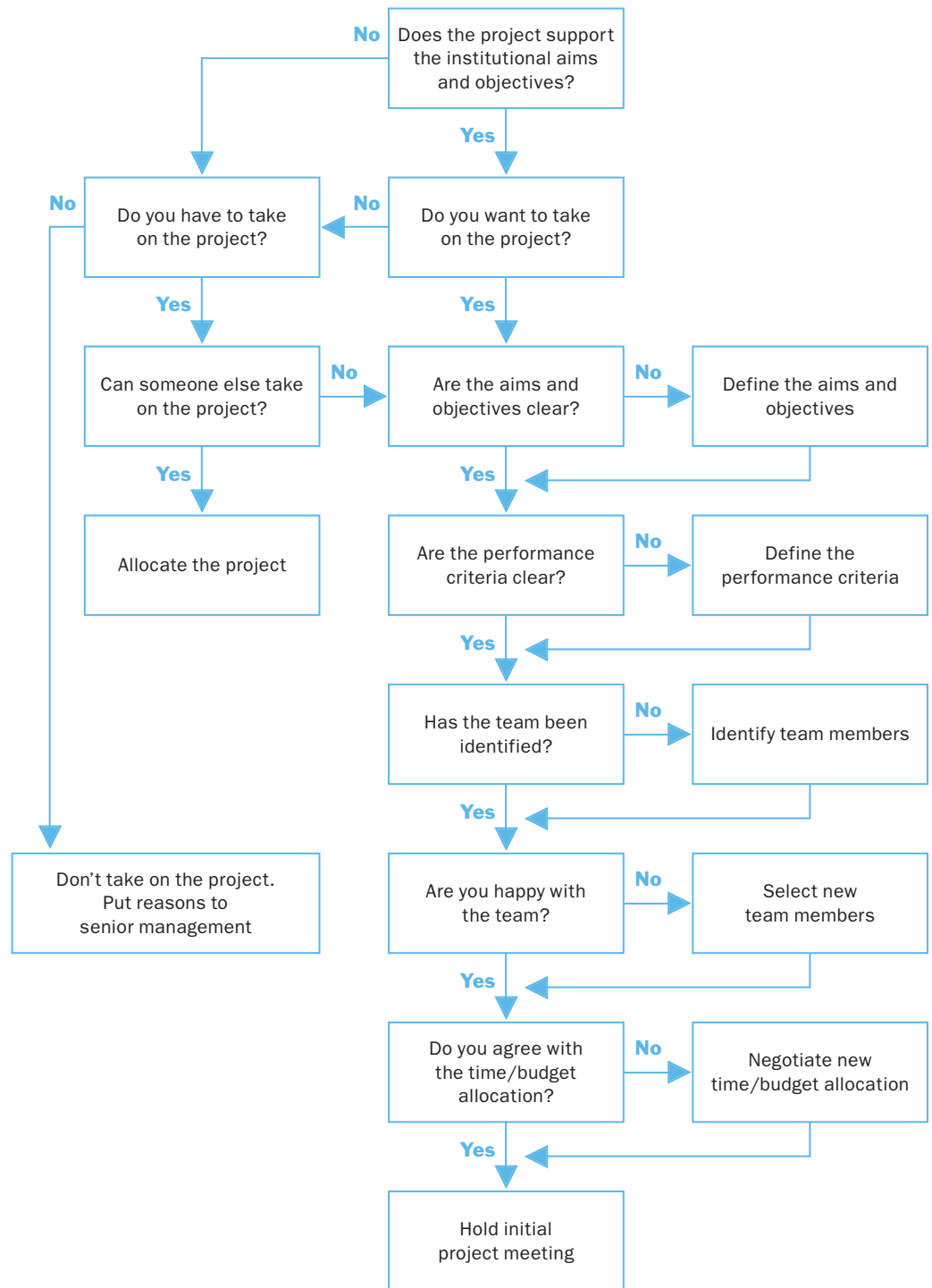
- Development should be driven by educational needs, not the technology.
- The full costs of development need to be identified.
- An e-learning/ILT/ICT strategic plan needs to be developed that supports the college mission and institutional plan.
- The strategic plan should have achievable aims and objectives in the short, medium and long term.
- Objective performance criteria and service level agreements (SLAs) should be used to achieve the strategic aims and objectives.
- The strategic plan should be driven by a strategy planning group, which must have the support of senior management and have cross-sectional representation.
- 'Champions', who should be competent in project management and have ILT/ICT awareness (and skills if possible), need to be identified to drive specific developments.
- ILT/ICT staff training needs to be provided just before or as the developments take place; if training is provided too early or too late, it will be wasted.
- Financial systems need to be developed that inform the college management of what is being spent, how it is being spent and the returns that are expected on the investment.
- Existing good practice within the institution should be supported.
- Staff should be encouraged to undertake recognised ILT/ICT qualifications.
- A staff ILT/ICT audit needs to be undertaken to identify existing skills and to plan an ILT/ICT staff development programme.



How would you order and prioritise the items in the list above?? (You can undertake the same exercise with other lists throughout this publication.)

You may also find Figure 1.1 a useful starting point when considering whether to undertake a project. Sometimes there is no choice in the matter, but there may be opportunities to influence the project's aims and objectives, performance criteria, team membership and budget. Remember that the final results of the project will be the responsibility of the project manager. Potential project managers need to be actively involved at the very start of the project if they are to have any influence on project systems and structure.

Figure 1.1 Why take on an ILT/ICT project?⁴



(Source: Lockitt 2000)⁵

4 Download a digital learning resource from www.learningtechnologies.ac.uk/ecpd/DLOs/Unit11/unit11_why_take_on_an_ilt_ict_project.swf

5 Lockitt.W (2000) 'Practical Project Management for Education and Training' LSDA

1.5 Duties of the project manager

The main purposes of project management are to ensure that a project is completed successfully within the agreed time/budget allocation and to anticipate and deal with any associated problems that may arise. Before commencement, the project manager must also take into consideration the resources, staffing, budget allocation and other factors that could affect the project outcomes. Successful project management occurs when all these factors are coordinated and the project is completed successfully. A wide range of project management tools and resources now exists, and a good project manager will be able to evaluate them and select 'the right tools for the job'⁶. A project manager should:

- be accountable for the project's day-to-day management
- pick, or be involved in the selection of, the project team
- agree reporting procedures and the people accountable
- prepare the project action plan
- define the team members' responsibilities
- set performance criteria, reporting procedures and an action plan for individual team members
- monitor the project's progress regularly
- report any problems or concerns to senior management as soon as possible
- resolve issues as soon as possible
- ensure that the project is completed within budget
- make management and others aware of the project's benefits
- deliver the project outcomes on time
- ensure that all performance criteria have been achieved before closing the project
- evaluate the project
- produce a final report to senior management, identifying any issues that occurred during the project and any 'transferable models' that could be used to manage similar projects in the future
- market the project outcomes to those who would benefit.

1.6 What makes a good project manager?

A good project manager has four key characteristics (see Figure 1.2).

Energy

Project managers are expected to enthuse the project team, lead them to a successful outcome, act as a buffer between the team and senior management, and communicate effectively at all levels. The energy shown by individual project managers and team members was noted, for example, during the Q projects where, in a number of cases, the projects were only successful as a result of the energy, enthusiasm and persistence of those involved.

Ability

Project managers need to have curriculum experience and a range of management skills. E-learning projects also require considerable awareness of new technology, or the ability to manage 'experts' and to evaluate their inputs.

Vision

Successful project managers have the ability to project their ideas into the future, evaluate the consequences, and suggest ways of achieving the desired outcomes. Some seem to do this naturally and consider themselves fortunate when things go right; they may find on further analysis that success was the result of an intuitive action they undertook at an early stage of the project. Project managers should review both successes and failures, and try to identify the characteristics that led to each.

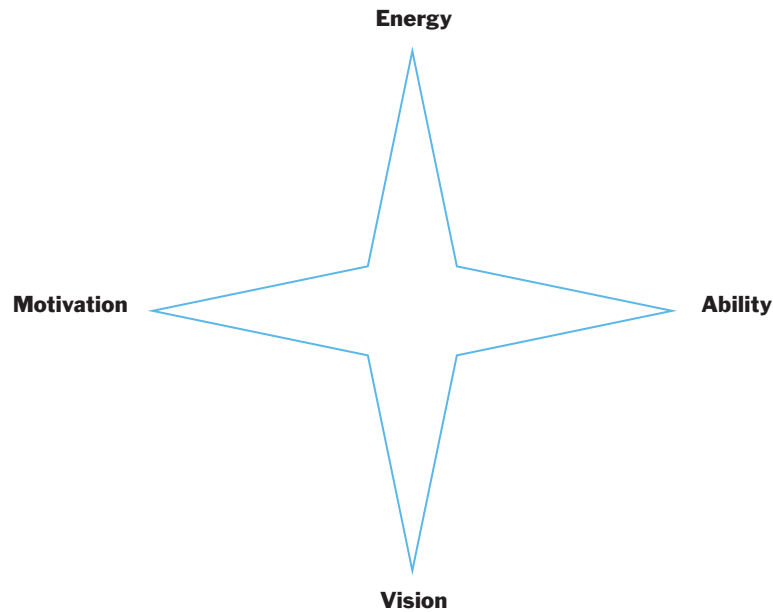
Motivation

It is not necessarily the case that financial or professional rewards motivate project managers. Successful projects have been undertaken with limited funding; the motivating factor has been the benefit for both learners and colleagues. It is important to have project managers who are motivated, and who keep this motivation throughout the project.

The purpose of project management is to foresee or predict as many of the dangers and problems as possible and to plan, organise and control activities so that the project is completed as successfully as possible in spite of all the difficulties and risks.

(Lock⁷ 1996, 1)

Figure 1.2 Characteristics of a good project manager⁸



(Source: Lockitt 2000)⁹

1.7 Estimating the cost of a project

The actual costs of projects can be established by:

- individuals or teams with past experience of project management
- teams of project management experts
- members of senior management
- finance officer(s)
- outside consultants
- individuals or teams following a predefined costing.

If costs are not estimated correctly, the project can be jeopardised before it even starts. It is very difficult to generate enthusiasm for an under-funded project; an experienced project manager or team may refuse to become involved if they feel that their project is not seen as a priority. An experienced project manager or senior manager should be involved in the costing of projects and such experience should be disseminated through the institution where possible. Questions that need to be considered include:

- How big is the planned project?
- Who should be responsible for undertaking the project's costing?

8 Download a digital learning resource from www.learningtechnologies.ac.uk/ecpd/DLOs/Unit11/unit11_what_makes_a_good_project_manager.swf

9 Lockitt.W.(2000) 'Practical Project Management for Education and Training' LSDA

- What are the 'real costs' – does the institution have a list of recommended costs for staff and resources?
- Have there been any past projects of comparable size and complexity?
- Does the organisation 'top-slice' income to pay for such projects?

Once these questions have been answered, the project manager should:

- obtain details of any comparable past projects
- use these past projects as a guide to the first estimate
- keep the project outcomes and costs within realistic and achievable targets
- establish the overall cost of the project
- break the costs down into project phases if possible
- keep track of the actual costs and learn from developing experience.

Managing the budget is an essential part of project management. Even the most successful project in terms of outcomes will attract criticism if the allocated budget has been exceeded. The project manager must have control of the budget and provide the final authorisation for any expenditure. This is not to say that budget responsibility cannot, or should not, be allocated to identified members of the team, but the project manager must be aware of the consequences if the allocated budget is exceeded. If budget responsibility is allocated to members of the team, they should all use a common accounting framework, and the project manager should ensure that all team members are aware of this framework, how to use it and their individual limits (of responsibility and expenditure) and responsibilities.

How a project's financial plan is developed depends on particular circumstances, but the following should be considered in all cases:

- the overall available budget
- a breakdown of costs for the project's individual stages
- the funding allocated to identified members of the team (if so allocated)
- who has authorisation and for how much expenditure
- the reporting procedures
- the ongoing report dates throughout the project
- implications if the budget is exceeded.

Most education or training projects are not intended to produce a financial profit. If they are intended to be profitable, information on predicted income will also be required. Although software is available for accounting purposes, it makes sense to keep the accounting process as simple as possible; software should only be used if all the people responsible for the budget are fully conversant with it.

1.8 Selecting a project team

Where possible, the first task of the new project manager should be to get a suitable team. Very few education and training projects have a dedicated project manager or team members; managers who may also have a teaching commitment or managerial responsibilities, which may conflict with project activity, normally manage them. Team members may have a full teaching commitment and be involved in other projects; much of what they do may conflict with time for any new project.

To make projects work under these circumstances, project managers should be able to pick team members whom they can trust; if possible, they should have a track record in successful projects. All too often the project manager and team are chosen by senior managers, with the project manager having very little say in the selection of the team.

The evaluation of the college-based Q projects identified that a project team should:

- be relatively short term (6–12 months)
- have a mix of skills and ability
- be flexible
- be responsive to new ideas and concepts
- have a clear idea of the project aims and objectives
- have good communication skills
- have good communication systems and resources
- be responsible to a project steering group
- be monitored regularly
- have a member of the senior management team allocated to it.

Anyone who has any interest in team sports knows that a winning team is made up of individuals who excel in different areas.

(Lake¹⁰ 1997, 108)

The management of the project team is an essential role of the project manager. The responsibilities of the team and its members must be clearly identified and agreed. During the project, members of the team should be responsible for:

- working within their allocated budget
- alerting the project manager to identified problems or issues
- keeping the project manager fully informed
- delivering allocated outcomes on time and within budget
- liaising with other team members and providing assistance where required
- monitoring and managing work under their jurisdiction

- resolving issues and problems where possible, or reporting them to the project manager
- producing necessary reports on time and to the agreed format
- identifying any opportunities that may arise during the project to the project manager.

To do their job, team members must be:

- aware of their roles within the project
- able to work with other members of the project team
- aware of the lines of communication and reporting
- able to work independently
- able to work within the allocated scope
- aware of the level of their authority (decisions and budget)
- aware of the project's budget and time allocation.

The project manager is responsible for ensuring that all team members meet the above criteria before the project gets under way.

1.9 Formalising internal and external partnerships

Project partners, both internal and external, tend to be very busy people who will be involved in a number of projects at the same time. If the project's outcomes are to be achieved, all partners need to know what is expected of them and by when. It is normal practice when undertaking projects to contract work out to individuals and teams, and to use formal contracts or service level agreements to ensure that the desired outcome is achieved. A SLA should contain:

- an overview of the project and its main aims and objectives
- the names of the people responsible for completion of the work
- objective performance criteria for expected outcomes
- an agreed timetable for the completion of the work
- the costs involved and the method of payment
- the penalty for non-completion of the work
- short-, medium- and long-term project evaluation criteria
- the completion date and reporting procedure.

It is advisable for project managers to have the SLAs produced by someone with knowledge of contract law. It is important to get each SLA correct at the start of the project, and to ensure that the project manager's interpretation of the SLA matches that of the person signing it.

A number of institutions have standard SLAs. Potential project managers should discover from colleagues who have undertaken projects within their institution the source and basis of any contracts or SLA they used. The addition of short-, medium- and long-term evaluation criteria to the project plan ensures that the project manager will be alerted if all is not going to plan, so that action can be taken.

1.10 Time management

The allocation and effective use of time was an issue highlighted by those involved in a majority of the Q projects. A great deal of time can be wasted if any fundamental questions are left unresolved until the project gets under way. As well as planning before the project, there are simple ways in which project managers have been able to maximise the time available, such as not being too ambitious and not relying on (for example) suppliers' promises to deliver required resource.

An analysis of the feedback from projects emphasised that it is important to:

- allocate enough time for the project
- ensure that essential resources, staff and other information relevant to the project are available as soon as it gets under way
- ensure that everyone is aware of their roles and responsibilities within the project
- ensure that everyone has agreed their performance criteria and signed service level agreements (where applicable)
- use effective communication systems
- develop an effective team approach to the project
- ensure that members of the project team can feed issues and problems back in a supportive environment, and that the feedback is acted on.

1.11 Single point accountability

A review and analysis of successful projects has highlighted the need for members of the project team and steering group to be accountable for allocated parts of the project. For example, meetings may take place at which, having previously asked several people to bring essential information for discussion, the chair finds that the information has not been gathered so the issues cannot be discussed.

Possible reasons for this are that:

- the chair is not forceful enough when distributing tasks
- the project is not seen as a priority area
- the communication system between the steering group and team members needs to be improved
- individual members are not clear about what is expected of them
- individual members do not take responsibility to deliver information.

In many cases, each person has been waiting to be contacted by others, or has thought that someone else was doing the job. This situation can arise if no one person is made responsible for the successful outcome of the given tasks. The same situation applies to projects.

Single point accountability puts the onus of success squarely on the shoulders of one person. That person may not in fact be the one to undertake the task in hand, but will make sure that it is completed or be answerable to the group or committee. With single point accountability:

- everyone is clear about their role and what is expected
- duplication of effort is eliminated or significantly reduced
- accountability must be passed on if the accountable team member falls ill or leaves the project; this should be done in consultation with the project manager or chair
- the accountable team member is responsible for reporting changes to the project manager
- the minutes of each meeting must record who is doing what, by when and how.

1.12 The initial team meeting

The initial meeting can set the tone for the project. It is essential at this meeting to remove any barriers that may affect the project, and to provide information that clearly identifies the project's aims and objectives and the performance criteria used to measure its success.

At the end of the meeting the project manager should use single point accountability to identify what needs to be done before the next meeting. Rules can be used to lay down formal structures; if this is done, all members of the team (including the project manager and senior managers) should use those rules.

At the initial team meeting the following basic information must be provided:

- a project bid/plan
- an action plan
- a budget (overall and breakdown)
- aims and objectives
- expected outcomes
- performance criteria
- a project structural plan
- steering group membership
- rules (if used)
- feedback and communication systems
- a list of who is responsible for what
- reporting procedures, times and formats.

The way to tackle ... potential conflicts is by the setting up of effective channels of communication.

(Lake¹¹ 1997, 108)

11 Lake.C. (1997) 'Mastering Project Management' Thorogood

1.13 Team management

This publication does not cover detailed questions related to team building; a number of excellent publications are available and some have been included in the bibliography. However, the Q projects identified issues that could affect the smooth running of a project. These include:

- culture
- personality
- management
- change
- conflicts
- complications
- leadership styles.

Culture

The culture in which the team works will affect its members' outlook. Some may have a predetermined mindset about ways of doing things: 'We have always done it like this.' This may be the first thing a project manager must overcome when starting a project with a new team.

Personality

An effective project team comprises a number of people, all with their own personalities and individual methodologies. A team should have a good mix of thinkers, reflectors, doers, planners and so on; a good project manager will be able to identify the skills and personality of each individual and give them a suitable role. Everyone is good at something; the project manager must find out what that something is.

Management

Once the project has begun, managers may wish to follow their own agenda. The project manager must act as an interface between the managers and the project team to keep the latter focused on the task in hand.

Change

The project manager should be aware of any changes that may affect the project outcomes, integrate those changes into the project, and deal appropriately with any changes affecting the project team.

Conflicts

Team members may work on other projects or with other departments, and conflicts of interest can occur. The project manager must be aware of where these may happen before the project gets under way, and must be in a position to take decisive action should conflicts occur during the project.

Complications

Even the best-planned project will encounter problems. How those problems are overcome, and their lasting effect, will depend on the planning that went into the initial project – whether time was built into the project for this eventuality, for example – and the way in which the team reacts to problems and other issues.

Very little will be achieved by apportioning blame. Learning from mistakes and problems is always the best strategy. Experienced project teams are full of people who have learned from mistakes.

Leadership styles

The style of leadership can have a dramatic effect on the team and the outcomes. An even, ‘firm but fair’ balance may be the best strategy. Project managers should have the skills necessary to unlock the full potential of each team member.

Leadership plays an important role in the successful execution of a project.

(Kliem¹² 1998, 45)

1.14 Project management software

The use of project management software will not make up for poor project management. Project management software is a tool, to be used by those who understand it. Training on project management software should take place before the project starts, not once it has begun, or valuable time that could be used achieving the project outcomes will be wasted. If project management software is used, all of the project team must be able to use it. Otherwise, the project manager will end up with information from the team in a variety of formats, which will obviously affect the effectiveness of the reporting process.

Project management software is useful:

- for large or complicated projects
- when the project team know how to use it properly
- when the benefits of using the software outweigh the problems.

A few questions to think about when considering whether or not to use project management software are:

- Is the software necessary?
- Will the software become the organisation standard?
- Will all the people involved in the project need to use it?
- What will be the cost per user?
- What will the cost of training staff be?
- Will it assist in achieving the project performance criteria?

- Is support available from the manufacturer?
- Is support available on the web?
- Are there user groups on the web?
- Will you be able to access the data remotely?

Websites that give advice on projects, teams and management methodologies

www.jiscinfonet.ac.uk/InfoKits/project-management/pm-intro-1.4

www.jiscinfonet.ac.uk/InfoKits/project-management/pm-proj-start-up-1.4

www.jiscinfonet.ac.uk/InfoKits/project-management/index_html

www.dfes.gov.uk/ppm/index.cfm?fuseaction=content.view&SiteID=1

www.dfes.gov.uk/ppm/index.cfm?fuseaction=content.view&SiteID=2

All links were available on 19 March 2007.

Section 2 Starting a project

The whole point of undertaking a project is to achieve or establish something new, to venture, to take chances, to risk.

(Project Management Body of Knowledge (PMBOK)¹³, 1987)

By the end of this section you will be able to:

- understand the reasons for making a business case
- identify and evaluate risk
- identify potential contract issues
- identify and produce measurable performance criteria
- understand the role of the project manager
- identify the key aspects of team building.

2.1 The business case

2.2 Planning a project

2.3 Risk management

2.4 Contract management

2.5 Measurable performance criteria

2.6 The role of the project manager

2.7 Team selection and building

2.1 The business case

One of the most essential criteria for running a successful project is the development and presentation of the 'business case'. Compiling the business case provides an opportunity to develop and put forward new and innovative ideas within a structured, but flexible, framework. It is an opportunity to highlight the benefits of the project, any cost savings it will have, how it supports the institutional or organisational plan and what improvements it will bring to individuals and the organisation as a whole. Most large organisations will have a standard business case format and, if you are new to project management, it is important to identify what information is required and how it should be presented to senior managers.

¹³ PMBOK Guides (2004) 'A Guide to the Project Management Body of Knowledge'

This may save you time and effort in the long term as it could be very embarrassing and time consuming to go through the process only to find you have to do it all again in the 'company format' or house style. There will be instances where you, as the project manager, did not make the original business case. However, as the person responsible for the project you should always ask for a copy, read it thoroughly and warn senior management if you have any concerns about the case put forward. If you do, try and get the business case altered or make sure your concerns are recorded.

In some projects a business case has not been made and the project may have come about through the personal intervention of a senior manager or board member. In these circumstances you should always insist that a business case is undertaken before the project is agreed.

One of the key questions to ask yourself as a project manager is 'If this project does not support the organisational aims and objectives why are we doing it?' The business case should provide enough information for you to be satisfied that the project is being undertaken for the right reasons.

Putting together the business case should be looked on as a mini-project and it may be that at the end of producing a business case senior management might decide not to undertake the project. Those involved should ensure the reasons for not going ahead with the project are recorded to avoid going over old ground in the future. You should also ensure that the business case is objective and unbiased. It can be easy to justify undertaking a project if you are too enthusiastic about it and neglect to include in the business case anything that may be detrimental. Make certain that all the evidence is presented and produce a balanced view based on information. You should also try to ensure that any alternatives are provided to key decision-makers and then let them decide on the way forward from the information and data presented in the business case.

Some basic information that should be included in the business case:

- reasons for the project
- options available
- benefits of the project
- risks associated with the project
- cost of the project
- timescale
- investment of resources and personnel
- appraisal of the project outcomes.

2.2 Planning a project

By this stage you should have already established:

- that the business case for the project has been made and is viable
- that the expected outcomes have been agreed (and are achievable)

- what level of resource, staff and funding is available
- that the reporting process is in place to senior management, project steering group or project board.

Planning the project from start to end will help you to identify potential problems at an early stage. You can then take the necessary action/s to:

- eliminate the problem
- reduce the impact of the problem
- offset the problem (give it to someone else)
- highlight the problem to senior management.

Intervention at this early stage of a project will save you time, resources and finance later.

During the planning stage you need to:

- identify key priorities
- identify key milestones
- establish controls
- establish the monitoring process
- confirm the budget
- confirm any related contract has been agreed and signed
- allocate key priorities to team members
- ensure all resources are available
- identify individual training needs for team members
- produce the project plan.

If you see the project as a journey, the plan should identify clearly where you are coming from, where you want to get to, and how you are going to get there.

When developing the plan you need to:

- make sure you subdivide the project and related work into manageable stages
- within each stage identify what the outcomes will be
- identify the milestones
- identify the reporting process, procedures, dates and times
- provide an estimate of the time requirements for each stage and the overall project
- identify interdependent deliverables
- identify team members and allocate responsibilities.

2.3 Risk management

The identification of risk is sometimes seen as a negative part of project management as it requires the project manager and/or senior managers to think about what could go wrong with a project. In some organisations, especially where there is a predominant 'can do' attitude, it is sometimes intimidating to highlight issues that could detrimentally affect the project. However, as the project manager you must identify any risks before the project gets under way – and either eliminate them or ensure they are managed and do not adversely affect the project's outcomes. If performed correctly risk management can be just as innovative and creative as other aspects of project management.

A few key aspects of risk management are to:

- identify potential risk
- analyse the level and complexity of the risk
- plan how to handle, control or eliminate the risk
- highlight the risk(s) and solution(s) to senior management
- allocate risk ownership
- identify a risk management process
- constantly monitor and control risk.

Within the PRINCE 2 project management methodology¹⁴ risk is categorised as:

- strategic or commercial
- economic, financial or market forces
- legal and regulatory
- organisational, management or human resources
- political
- environmental
- technical, operational or infrastructure.

Identifying to which category(or categories) the risks to your project belong can be a good place to start.

2.4 Contract management

At some point during the initiation stage of the project (and for example if the project is being funded by an external body) you may need to agree and sign a contract. The contract should clearly state what is to be done, by when, what the outcomes will be and, if applicable, what penalties will be incurred if the agreed outcomes are not achieved. Normally the contract will be handed over to staff in the organisation's legal department and they, together with senior managers, will make the decision, or not, to sign the contract as it stands. As part of the risk assessment you will have already decided if your project is low, medium or high risk and this, together with its size and the financial commitment, may affect the type and complexity of the contract. The first thing to remember when managing contracts is never sign, or even verbally agree, anything before obtaining written permission to do so from senior managers or staff in the legal department. Even verbal agreement can be binding and it is essential to ensure you look after your organisation's interests and do not put senior managers in a situation where they could be financially liable.

2.5 Measurable performance criteria

To establish a project's success, objective and measurable performance criteria must be established at the start of the project. They must state what is being done, how it is being achieved, when it will be achieved, and who is responsible – information that will be incorporated into the SLA. It can be difficult to write objective performance criteria at first as they require considerable attention if they are to be meaningful.

For example, the following statements are not objective criteria:

Staff from some curriculum areas will be trained to use information technology (IT). Some will obtain a qualification at the end of the training period.

To be objective performance criteria, the statement must be rewritten as (for example):

Between January and March 2008, ten staff from the Mathematics Department and six staff from the English Department will be trained to use [insert name of software or learning environment etc]. All staff will be working towards a nationally recognised qualification – [insert examination and level] – and all staff will be expected to obtain this qualification by 1 April 2008.

2.6 The role of the project manager

The project manager is given the role of the everyday running of the project by, and on behalf of, the project board, steering group or senior management. The main responsibilities of the project manager are to ensure that the project produces the agreed outputs, to the agreed quality, in the time and budget allocated.

The PRINCE 2 system¹⁵ identifies the specific roles of a project manager as being:

- to manage the production of the required products
- to direct and motivate the project team
- to plan and monitor the project
- to agree any delegation and use of project assurance roles required by the project board
- to produce the project initiation document
- to prepare project, stage and, if necessary, exception plans in conjunction with the team
- to identify what the roles of the project assurance staff are, and agree them with the project board
- to manage the risks, including the development of contingency plans
- to liaise with programme management if the project is part of a programme
- to liaise with programme management or related projects to ensure that work is neither overlooked nor duplicated
- to take responsibility for overall progress and use of resources and initiate corrective action where necessary
- to be responsible for change control and any required configuration management
- to prepare and report to the project board by providing highlight reports and end stage reports
- to liaise with the project board or staff in appointed project assurance roles to ensure the overall direction and integrity of the project
- to agree technical and quality strategy with appropriate members of the project board
- to prepare the lessons learned report
- to prepare any follow-on action recommendations required
- to prepare the end report
- to identify and obtain any support and advice required for the management, planning and control of the project
- to be responsible for project administration
- to liaise with any suppliers or account managers
- to undertake team manager and project support roles when necessary.

PRINCE 2 (2005) p.401¹⁶

¹⁵ www.prince2.com

¹⁶ 'Managing Successful Projects with PRINCE 2' (2005)

2.7 Team selection and building

The majority of projects involve working in teams and, as the project manager, it is your responsibility to pick the right individuals, ensure they work as a team and achieve the project outcomes. Selecting teams is not always an easy task as those individuals you would prefer to have as members may not be available and it may be that you have to compromise or negotiate. You should feel comfortable with the selected team and identify any individual training requirements you feel important to the success of its members. If you are unhappy with a team member you need to discuss this with senior management as it is pointless having a member of the team about whom you do not feel confident.

In order to motivate and involve the team you should ensure that members:

- are involved in the planning process
- are committed to the project
- are able to express their ideas and feelings about the project
- understand the business case and importance of the project
- all support the aims, objectives and outcomes of the project
- can use their individual strengths, skills and experience
- are encouraged to take responsibility for individually allocated tasks
- are accountable for individually allocated tasks
- are used to help you plan individual and team tasks
- are encouraged in, and given time for, team building and collaboration
- avoid bureaucracy but implement appropriate systems and procedures
- spend time listening to each other.

Action any good ideas that come from the team and ensure credit is given to the person(s) who initiated them.

Websites that give advice on starting a project

The Business Case –

www.learningcircuits.org/2000/feb2000/feb2000_elearn.html

Risk management strategy –

www.ogc.gov.uk/sdtoolkit/reference/documentation/p25_riskmanstrat.html

Contract management –

www.ogc.gov.uk/Introduction_to_Procurement_contract_management.asp

Performance criteria –

<http://apu.gcal.ac.uk/ciced/Ch03.html>

Team building –

www.spotteddog.u-net.com/guides/start/frameset.html

All links were available on 19 March 2007.

Section 3 Managing a project

By the end of this section you will be able to:

- identify the essential role of a project manager
- understand basic monitoring processes
- understand the basics of change management
- identify and manage stakeholders.

3.1 What is project management?

3.2 Monitoring progress

3.3 Managing change

3.4 Managing a steering group

3.5 Managing stakeholders

3.6 Managing customer satisfaction and expectations

3.1 What is project management?

Project management involves guiding a project from start to finish and ensuring all of the anticipated outcomes are achieved on time, within budget and to the expected quality. Project managers should be able to apply their knowledge, skills and experience across a broad range of activities in order to ensure the project is completed successfully. They lead or 'champion' the project and are expected to motivate everyone involved and affected by it. Project managers also have the ability to plan, negotiate, coordinate and manage budgets, staff and interested parties.

JISC¹⁷ has characterised projects as being:

- instruments of change
- non-routine
- unique
- composed of inter-dependent activities
- carried out by people who don't normally work together
- temporary, with defined start and end dates
- intended to achieve a specific outcome
- frequently risky and involving uncertainties.

¹⁷ www.jiscinfonet.ac.uk/InfoKits/project-management/index_html/#what-is-a-project

3.2 Monitoring progress

There are various ways in which you can monitor progress, including for example:

- making informal telephone calls to check progress
- making a point of calling in to see people
- sending e-mails
- video conferencing
- writing web blogs etc
- using text messages
- having regular formal or informal meetings
- having meetings of the project board
- having meetings of the project steering group
- monitoring reports.

The amount and complexity of the monitoring and recording process will depend largely on the size of the project, the budget, interdependence between stages, the physical location of team member and partners and the number of staff involved.

There are two levels of monitoring that need to be taken into consideration:

- the strategic level
- the day-to-day level.

Strategic monitoring of the project will normally be via the steering group or project board and it is the responsibility of the project manager to provide the necessary information, data and reports according to the agreed reporting process and procedures.

The project manager will normally undertake the day-to-day monitoring and send information to nominated team members according to the agreed reporting process and procedures. The project manager should also undertake more informal monitoring of the team and project by dropping in to see how things are going, by telephone or one-to-one or team meetings. This provides an opportunity for the project manager to identify and record any issues that he or she observes as part of the formal monitoring of the project.

Where possible project managers should implement sufficient monitoring processes and procedures to ensure they know what is going on; these should not be so bureaucratic that they burden the individuals undertaking the work. Over-burdensome monitoring systems and procedures can be sufficiently time consuming to affect the efficiency of the project and cause problems in their own right.

3.3 Managing change

In the context of project management there are two types change to manage:

- change that occurs during the project life cycle that affects the outcomes (change control)
- change caused by the implementation of the project (change management).

Change control

If changes made throughout the project are not controlled the final outcomes may not resemble the anticipated outcomes, as specified in the business case at the start of the project. Uncontrolled changes to the project specification have been the downfall of numerous projects and change control is an important part of the project manager's responsibilities.

All changes to the project specifications and outcomes need to be assessed by the project manager and even if it is considered that these changes can be accommodated they should be recorded and agreed by the project board or steering group. It is very easy to fall into the trap of allowing a small change to be made, which leads to another and another until the cumulative effect is that the project you are now working on bears no resemblance to the original brief. This 'scope creep' is all too common in projects and it is essential that the ground rules between the client and producer are established at the start of the project. If not you may well find yourself in conflict with the client as the costs and resources requirements needed to accommodate the changes rise. Any approved changes should be reflected in a revised schedule, budget and resource allocation.

Change can also come from outside the project and these changes also need to be monitored. They include:


- social changes
- technical changes
- economic changes
- environmental changes
- political changes
- legislative changes
- possible organisational, corporate or institutional change
- change of customer
- new suppliers
- competition.

Change management approaches and strategies

There are various ways to approach change and there is no single strategy that will suit every eventuality. The strategy chosen to affect change should be the most appropriate for the particular change you wish to implement, within the circumstances facing you. Five different broad approaches to affecting change are shown below, based on work done by Thurley and Wirddenius¹⁸ (1973).

¹⁸ Thurley, K. Wirddenius, H (1973) Supervision: A Reappraisal, London, Heinemann

Table 3.1 Overview of the five change management strategies¹⁹



Strategy	Advantages	Disadvantages
Directive	<ul style="list-style-type: none"> ■ Relatively fast 	<ul style="list-style-type: none"> ■ Ignores the views of those affected by change
Expert	<ul style="list-style-type: none"> ■ Uses relevant expertise ■ Small groups required ■ Relatively fast to implement 	<ul style="list-style-type: none"> ■ Expertise may be challenged ■ Resistance of those not consulted
Negotiated	<ul style="list-style-type: none"> ■ Change recipients have some say ■ Resistance to change likely to be reduced (or areas of disagreement highlighted) 	<ul style="list-style-type: none"> ■ May be relatively slow ■ Anticipated change may have to be modified
Educative	<ul style="list-style-type: none"> ■ People committed to change 	<ul style="list-style-type: none"> ■ Relatively slow ■ Likely to require more resources and more costs involved
Participative	<ul style="list-style-type: none"> ■ Change more likely to be accepted ■ More people committed to change ■ More opportunities for individual and organisational learning 	<ul style="list-style-type: none"> ■ Relatively slow to implement ■ More complex to manage ■ Will require more resources ■ Increased costs

(Source: Lockitt²⁰ 2004)

1. **Directive strategies** This strategy highlights a manager’s right to manage change and the use of authority to impose change with little or no involvement of other people. The advantage of the directive approach is that change can be undertaken quickly. However, the disadvantage of this approach is that it does not take into consideration the views or feelings of those involved in, or affected by, the imposed change. This approach may lead to valuable information and ideas being missed and there is usually strong resentment from staff when changes are imposed rather than discussed and agreed.

19 Download two digital learning resources from www.learningtechnologies.ac.uk/ecpd/DLOs/Unit11/unit11_overview_of_5_main_management_strategies_1.swf and www.learningtechnologies.ac.uk/ecpd/DLOs/Unit11/unit11_overview_of_5_main_management_strategies_2.swf

20 Lockitt.W. (2004) ‘Change Management’ RM Limited

2. **Expert strategies** This approach sees the management of change as a problem-solving process that needs to be resolved by an 'expert'. This approach is mainly applied to more technical problems (for example the introduction of a new learner management system), and will normally be led by a specialist project team or senior manager. There is likely to be little involvement with those affected by the change. The advantages to using this strategy are that experts play a major role in the solution and the solution can be implemented quickly as a small number of 'experts' are involved. However, those affected may have different views than the expert and may not appreciate the solution being imposed or the outcomes of the changes made.
3. **Negotiating strategies** This approach highlights the willingness on the part of senior managers to negotiate and bargain in order to effect change. Senior managers must also accept that adjustments and concessions may need to be made in order to implement change. This approach acknowledges that those affected by change have the right to have a say in what changes are made, how they are implemented and the expected outcomes. The disadvantage to this approach is that it takes more time to effect change, the outcomes cannot be predicted and the changes made may not fulfil the total expectations of the managers effecting the change. The advantage is that individuals will feel involved in the change and be more supportive of the changes made.
4. **Educative strategies** This approach involves changing people's values and beliefs, 'winning hearts and minds', in order for them to support fully the changes being made. This should involve the development of a shared set of organisational values that individuals are willing and able to support. A mixture of activities will be used: persuasion, education, training and selection, led by consultants, specialists and in-house experts. Again, the disadvantage of this approach is that it takes longer to implement. The advantage is that individuals within the organisation will have positive commitment to the changes being made.
5. **Participative strategies** This approach stresses the full involvement of all those involved, and affected by, the anticipated changes. Although stimulated by senior managers the process will be less management dominated and controlled more by groups or individuals within the organisation. The views of all are taken into account before changes are made. Outside consultants and experts can be used to facilitate the process but they will not make any decisions about the outcomes. The main disadvantages of this process are the length of time taken before any changes are made (and it can be more costly because of the number of meetings that take place), the payment of consultants or experts over a longer time period, and the difficulty of predicting outcomes. However, the benefits of this approach are that any changes made are more likely to be supported because all those affected are involved; the commitment of individuals and groups within the organisation will increase as those individuals and groups feel ownership over the changes being implemented. The organisation and individuals also have the opportunity to learn from this experience and will know more about the organisation and how it functions, thus increasing their skills, knowledge and effectiveness to the organisation.

Although the five change strategies have been described independently they are not mutually exclusive and a range of strategies can be employed to effect change. Part of the skill of effective change management is to recognise what strategies to employ, when and where, and how to use them in order to be most effective. Other issues such as health and safety, accessibility and union representation will also need to be taken into consideration when undertaking change.

The information shown in Table 3.1 summarises the five change management strategies and their main advantages and disadvantages.

Opposition to change

Managers may see opposition to change as being negative and those resisting change as troublemakers who need to be converted. However, Kotter and Schlesinger²¹ (1979) put forward several reasons why individuals resist change:

- **loss of control** – when individuals feel that change is being done to them rather than done by them
- **loss of face** – when the changes being suggested result in people losing face or status
- **loss of identity** – people build an identity around their role and do not like any loss of symbols, tradition or status
- **loss of competence** – people do not like having their competence challenged or being put into situations where they lack the necessary competences
- **excessive personal uncertainty** – where the individual is not aware of how the changes will affect them
- **surprise** – people do not like unexpected change
- **more work** – change normally means more work for those left if colleagues are removed
- **past resentments** – people can resist change from individuals or groups with whom they have had a bad experience in the past
- **unintended consequences** – when change in one area has a knock-on effect in another
- **real threats** – when change threatens an individual or group directly.

How to reduce the opposition to change?

You can reduce opposition to change by:

- not making changes that are unnecessary
- listening to the reasons people give for not making a change
- making sure people know why the changes are necessary, how they will be made and who will be affected

21 Kotter, J.P. Schlesinger, L.A. (1979) 'Choosing strategies for change', Harvard Business Review, March/April, pp.106–14

- communicating the changes to everyone involved
- educating them about the reasons for change
- making sure everyone affected participates and is involved in the change management process
- identifying and supporting people who need more information and education
- negotiating and bargaining rather than dictating
- building up support groups and alliances
- identifying and working with key people within the organisation
- highlighting and discussing what will happen if the changes are not made.

3.4 Managing a steering group

Setting up a project steering group, as demonstrated by the Q projects, is a contributing factor to successful project management within education and training environments. The group should have a member of senior management involved and, if possible, contain members external to the organisation from business, industry or partnership organisations.

When setting up a steering group, consider the following:

- Is senior management represented?
- Are all appropriate partners and outside organisations represented?
- Does the steering group contain a cross-section of 'experts'? (This is essential with new technology projects.)
- Are minutes of the meetings formally recorded and presented to senior management?
- Are meeting dates set well in advance?
- Have reporting procedures been established?

The steering group should provide constructive help and advice to the project manager and team, so that they can successfully achieve the identified outcomes. Unfortunately, and possibly because of conflicting interests, some steering groups may manipulate or even sabotage their projects. Should this occur a strong chairperson is needed: the issues should be resolved or new members should be chosen at a very early stage.

During a 12-month project it would be normal for a steering group to meet three times: at the start of the project, halfway through to receive the interim project report, and at the end to receive the final report. The steering group should also discuss the integration of what has been achieved, and discuss ideas for future projects that may have arisen. It is normal practice for the steering group to be involved in deciding how the project outcomes should be disseminated.

A member of the steering group (normally the chair) should be nominated and given sufficient delegated powers to enable the project manager to overcome issues that fall outside his or her remit. The nominated steering group member should be someone easily contactable and with sufficient time to help and advise the project manager if required.

3.5 Managing stakeholders

Stakeholders are normally defined as any individual or organisation affected by the project. This would include the client contracting you to undertake the project and the end user. Key stakeholders are those individuals or organisations that will be most affected by the outcomes of the project and they should be members of the steering group or project board. Key stakeholders may also be individuals or organisations that could hinder the progress of your project and it is important to identify them and try to involve them or reduce the impact of their opposition.

When selecting the steering group it is always advisable to invite those who must be consulted before actions are taken, those who will contribute innovative ideas or strategies, and some outside or independent members who will be able to provide a different perspective from what you are trying to achieve. On large projects there may be too many key stakeholders to invite onto the project steering group or project board and if this is the case you should consider setting up a stakeholder group and having one or two representatives on the steering group/project board.

3.6 Managing customer satisfaction and expectations

Ensuring that customers' expectations are managed throughout the project is an essential part of the project manager's role. Early agreement on the expectations and final outcomes of the project is crucial and these need to be included as part of the contract. A number of projects fail due to over-optimistic customer expectations about what technology can achieve and any project should identify what is realistic within the budget and time available.

The introduction of new ideas and concepts throughout a project needs to be carefully managed as it is all too easy to allow the customer to make a number of small changes throughout the project that accumulate into a major change that seriously damages the project and requires major renegotiation. When customers request change (and they will) it should be managed with care and consideration and a number of alternatives, with attached cost and resource implications, provided.



You have been working on some multimedia learning material and produced a pilot for the customer. The feedback is good but one request is that all the text is voiced, by a human rather than screen reader. There will be the equivalent of approximately 30 pages of text and voiced text was not part of the project brief, contract or budget. Can you identify some of the budget and resource implications? How would you explain these to the customer?

Anyone who has managed a multimedia project will be able to relate to this request and realise the significant implications it would have on the project with regard to the resources, budget and time allocation. Some of the implications in this case include:

- finding an organisation that can undertake the voiceover
- paying for actors to read the text (there may be a number required to cover sex, ethnicity etc)
- redesigning the software to accommodate the changes
- reprogramming the software to accommodate the voiceover
- any delay due to late arrival of voiceover files
- finding the increased cost to pay for production and increased design and programming time.

The above are just a few of the implications that arise from what the customer will see as a simple request. It is your role as project manager to ensure the customer gets what they want but also to manage expectations and costs. By employing quality change management procedures and systems the above example could be easily dealt with and an amicable resolution reached.

Websites that give advice on how to manage a project

Information on monitoring and control –
www.dir.state.tx.us/eod/qa/monitor

Guidelines for managing and monitoring major IT projects –
www.ssc.govt.nz/display/document.asp?NavID=166&DocID=2726)

Dealing with stakeholders –
www.dfes.gov.uk/ppm/index.cfm?fuseaction=content.view&ContentID=11&SiteID=2

DfES Managing Progress –
www.dfes.gov.uk/ppm/index.cfm?fuseaction=content.view&CategoryID=3&ContentID=181&SiteID=2

All links were available on 19 March 2007.

Section 4 Closing a project

By the end of this section you will be able to:

- identify the main reasons for closing a project
- identify the main criteria to measure the success of a project
- identify effective ways to disseminate project outcomes.

4.1 Reasons for closing a project

4.2 The post-implementation review

4.3 Measuring success

4.4 Disseminating success

4.1 Reasons for closing a project

Formally closing the project is another important part of project management. The project manager should make sure that all performance criteria have been achieved, invoices paid and partners thanked for their contribution. Most projects in education and training also require the production of some sort of final report delivered to senior managers. Useful subjects to include in the final project report include:

- the project summary
- project team and steering group membership
- initial aims and objectives
- expected outcomes
- budget and time allocation
- actual outcomes
- problems and issues encountered during the project
- solutions
- transferable models of good practice
- the 'way forward'
- feedback and evaluation
- a conclusion
- recommendations.

The final report's format will vary, but project managers should try to present the written report to senior managers so that they are able to answer any questions, highlight good practice and undertake any recommendations that may arise. The aim of any project undertaken in education and training should be to improve the potential or quality of service to the learners and, if possible, to produce a cost saving for the institution. The success of any such project is usually measured not in profit or production, as it would be in business and industry, but by integration of the outcomes into normal curriculum delivery and the follow-on projects it stimulates.

When formally closing the project you need to ensure that:

- the outcomes of the project have been signed off by the client
- all procedures and systems for the handover are in place
- all reports, dissemination events etc have either taken place or are planned and financed
- any outstanding issues or recommendations have been agreed and documented
- any outstanding issues or recommendations have an action plan
- the results of the project have been disseminated to all stakeholders
- the post-implementation review has been planned and financed
- there are no 'loose ends'.

4.2 The post-implementation review

Depending on the size and complexity of the project, the post-implementation review (PIR) normally takes place 6 to 12 months after it formally closes. The aim of the PIR is to determine if the project delivered the expected impact, defined in the business case, in terms of benefits, outcomes and cost. It is important to plan for the PIR before the end of the project and also to identify who will undertake it and what success criteria will be used. The project manager does not normally undertake the PIR, for two reasons: he or she will probably be engaged in other projects; and this is a chance to undertake an independent review of the impact of the project and either confirm that objectives have been achieved or identify further work required.

The PIR should identify:

- if the project achieved the expected benefits
- if there were any unexpected benefits
- if there were any unexpected issues
- feedback from users
- recommendations for further action
- cost, time-scale and resource implications of any follow up actions.

4.3 Measuring success

One of the problems associated with projects is how to measure the success and impact they have had. There are two measures you need to ensure are known at the start of any project.

- Identify where you are now and where you want to get to by the end of the project. In order to do this you need to analyse the current position via secondary data (already available) or primary (gathering new) information or data. For example, you may wish to extend the use of e-learning materials within the college. The first thing to do would be to find out what already exists, who is using it, how it is being used and why. When the project is completed you can refer back to the starting point and identify how far you have travelled during the life cycle of the project.
- Identify a set of objective and measurable performance criteria. It is pointless saying 'at the end of the project we will increase the use of ICT' without saying what this means in terms of start and finish measures. You need to break down the outcomes into measurable phases and outcomes. These can then be measured throughout the project and appropriate action can be taken if any of them are not being achieved.

4.4 Disseminating success

Within corporate organisations projects are normally undertaken to improve the operation of the business, whether this is the quality of service, new markets or innovative design. It is understandable therefore that many organisations are unwilling to disseminate good practice within their industry as this would reduce their competitive edge and would not be in their best interest.

However, many projects undertaken by education and training organisations are funded from public money and it is therefore incumbent on any organisation using public funding to disseminate the findings of their projects in order to raise the level of good practice throughout the sector. Due to the ever changing nature this dissemination is essential when ICT/ILT-related projects are undertaken to ensure the limited amount of public funding available is used to its full potential.

Dissemination activities are discussed in section 5.8, below.

Website giving advice on how to close a project

Closing the project –
www.dfes.gov.uk/ppm/index.cfm?fuseaction=content.view&CategoryId=4&ContentID=182

Link available on 19 March 2007.

Section 5

Q project tips

- 5.1 Questions to ask when taking on a project
- 5.2 Saying 'no' to a project
- 5.3 Planning your project
- 5.4 Managing your project
- 5.5 Monitoring your project
- 5.6 Getting your project back on track
- 5.7 Closing your project
- 5.8 Disseminating your project outcomes

5.1 Questions to ask when taking on a project

Why me?

It may be that you are initiating the project and the answer to this question will be relatively simple. You may have identified something that would improve your area of the curriculum, your department or the institution as a whole. In this instance you will be the initiator and manager of the project and there should be no question as to whether you want to do it or not.

However, there are instances where a senior manager or colleague will ask you to take on a project and the first question you should be asking is why? Are you an expert in this particular area? Do you have specialist skills that are essential to the success of the project? Do you have a track record of managing successful projects? Identifying the reasons why you have been asked to do the project will raise some interesting questions and is an essential early step in managing successful projects and being a successful project manager.



You have been asked to take on a project. Make a list of the reasons why. If you are initiating the project why are you the best person – or not – to take it forward?

Is the project necessary?

There are instances where projects have been undertaken without any evaluation of their relevance to the learners, organisation or individual staff members. Although a project may 'look interesting' this is not a justification for taking it on. Most successful projects will have a good business case and will be supported by key stakeholders. Some projects are undertaken by enthusiasts purely out of interest or in an effort to extend their knowledge or experience. These sorts of projects can be supported, and in some instances have delivered significant results. However, if a project has cost, personnel, resource or other implications that affect the organisation or its clients, it should be based on a good business case that highlights the benefits the project will have and the financial implications of taking it on.

If you are considering implementing a project you may think that it will not have any effect on the cost, personnel and resources of your organisation. However, if the project is worth doing it should have some benefits to the users and the organisation, and you should take some time to think about the implications of the project you are about to take on.



If you are thinking about starting a project can you identify the implications it will have on resources, staff, finance and your organisation's strategic plan?

Who has authorised it?

If you are initiating a project within your organisation, it may be to extend the curriculum, for pure interest, or some small scale research. If this latter is the case you should at least inform your line manager; it may be that they support what you are trying to achieve and will provide some help and assistance. Good line managers will always find out what their staff are involved in and it's better for you than someone else to tell them about it.

If the project has come from your line manager you need to find out how far up the management chain this support goes. It may be that the project is deemed essential at departmental level but is not supported by senior management at a higher level. Most successful projects need the support of senior managers and you need to think seriously about the issues involved in taking on a project that does not have support from senior management.



If you are taking on a project think about the key stakeholders from whom you need support.

Make a list of the key people that need to be involved and ensure they are supportive before you start the project.

Who will manage it?

Before taking on any project you should identify to whom you are reporting, how often, and how (for example formally or informally, in writing or verbally). You also need to ensure clear lines of communication are established and that the person with ultimate control of the project is identified (if possible this should be you as the project manager). Poor lines of communication, ineffective reporting procedures and lack of identification of key stakeholders are common reasons for projects to fail. Make sure you know the Who, What, When, Where and How of managing and reporting on a project.



If you are taking on a project be clear about who you will be reporting to, what you will be reporting, when these reports need to be made, and how they should be made (formal/informal etc).

Has a business case for the project been undertaken?

The project business case should answer the question of why the project is needed. However, as the person taking on the project, and ultimately responsible for the outcomes, it is advisable for you to familiarise yourself with and assess the business case yourself and to voice any concerns you may have.

If you are initiating the project it will be up to you to provide the business case to senior managers if resources, personnel and funding are to be released. The headings shown in Table 5.1 can be used either to put together a simple business case or to evaluate one that you are being asked to manage. Remember, a business case does not necessarily have to be complicated or involved but it should answer a very simple question: 'Why should I do this project?'



Table 5.1 can be used either to evaluate a project you are being asked to manage or to provide the basis for producing a business case for a project you are initiating.

Table 5.1 Business case content

Reasons for the project	
Options available	
Benefits of the project	
Risks associated with the project	
Cost of the project	
Timescale	
Investment of resources and personnel	
Appraisal of the project outcomes	

What are the outcomes?

If a business case has been produced it should highlight the expected outcomes of the project. As the person responsible for delivering the outcomes you need to agree that they are achievable and you are happy with the way in which the outcomes are defined. You may wish to add some measurable (objective) performance criteria to the outcomes to ensure they can be measured and are not 'subjective' – open to interpretation.

Who else is involved?

If other people are involved in the project it is essential that you, as the project leader, have a say in who works on the project. If possible you should be personally involved in the selection of staff and ensure the team you pick has the right skills and experience for the task in hand. You also need to identify any training and resource needs required before and during the project. For example, you may choose to use project management software or e-communications such as computer-based videoconferencing. You need to ensure that all members of the team are competent to use the software or provide training to enable them to contribute effectively.

Who will have overall project authority?

The overall authority and decision-making may reside with a project board, senior managers or project steering group. However, as the project manager you need to ensure that you have overall control of the day-to-day running of the project and that the level of your authority is clearly defined. As the person responsible for the management of the project your performance will be judged on the deliverable outcomes. It is essential that you are not tied to bureaucratic and time-consuming processes and those decisions can be made quickly and effectively.

Who will be affected by the project?

It is important to spend some time thinking about who will be affected by the project you are undertaking. It may be that some members of staff within the organisation will feel threatened by the project and, unless you take action to reduce their concerns at an early stage, they may try to undermine the outcomes or become obstructive. It is essential to spend a little time at the start of the project raising the awareness of those people who will be affected about the potential benefits of the project. This may also highlight new ideas or individuals who are keen to help.



Use Table 5.2 to identify who will be affected by the project, if the impact of the project will be positive or negative and what actions you could take to ensure those involved do not become obstructive.

Table 5.2 People who will be affected by the project, and how it will affect them

Who will be affected?	Will the impact be		Action to be taken
	Positive	Negative	

How will it affect me?

If you are initiating the project you will have already thought about the impact it will have on you personally, the time commitment and the amount of work involved. If you have any doubts about taking it on you need to evaluate them and discuss your concerns with senior management before agreeing to take part in the project.

Your personal feelings toward a project are extremely important and should not be ignored. After all you will be the project champion and it will be difficult to champion something that you don't believe in.

Q project tips

5.2 Saying 'no' to a project

Why turn a project down?

There may be many reasons for turning down a project. You may already be fully committed to existing projects; the time-scale may be too short; the project may have limited resource and staff allocation; or you may feel the outcomes are not worth the effort that will be needed. Whatever the reason for turning down a project you should aim to be diplomatic about it and highlight the reasons why you don't want to do it in a logical and rational way.

There may be some issues that could be overcome if you negotiated alternatives with senior management. If the project is worth doing and you have been identified as the person to do it senior managers should be receptive to alternatives and other suggestions.

Reasons why a project may be unsuccessful

Unless this is your first project you will already have built up a range of personal skills and knowledge from successful and unsuccessful projects you have undertaken. Every project manager, for one reason or another, has experienced at least one unsuccessful project. However, a good project manager will evaluate and learn from the experience and try to ensure it does not happen again.

The main reasons for a project being unsuccessful are that:

- it had no business plan
- it had an insufficient budget
- there were insufficient team skills or competence
- it had poor team management
- it had insufficient time allocation
- it had limited resources
- it had poorly defined aims and objectives
- it had no objective (measurable) performance criteria
- it had poorly defined outcomes
- there were poor communications between team members
- there was poor project management.

There are others but these are the main ones. If you can address and manage these matters correctly, you will at least stand a good chance of finishing the project within the agreed time-scale, to budget and be able to deliver the outcomes to the expected quality standard.



Think about projects you have been involved with, either as a team member or manager, and identify some of the problems that you encountered. How could these have been avoided or their impact reduced?

How do you make those issues known?

If you have identified any problems or issues with the project you have been asked to take on you should always discuss them with the person(s) asking you to take on the project before doing anything more official. It may be that this person can give you further information or advice. He or she may appreciate you raising concerns, share them with you, and be ready to take them to senior management for further clarification or review. It would also be advisable to discuss issues with the proposed team members, as they may be willing to take on some of the responsibility and this would be enough to persuade you to take it on. Team members may also suggest ideas and alternatives you had not thought about, which you can use in discussion with senior management.

However, once this informal stage is over, you should record the issues raised and, if applicable, the solutions you find and keep them as part of the project log. You may find this information useful at a later stage of the project as people cannot always remember what changes have been made to the outcomes during the project lifecycle.

Change management is an essential part of good project management and more information can be found in section 3.

Negotiating alternatives

The first rule of good negotiation is not to put the person with whom you are negotiating into an intractable situation. If you do they will normally maintain their position and the negotiation will fail. Experienced negotiators give alternatives or incentives and at the end of the negotiation you should both feel that you have achieved something. Poor negotiation leads to one of the participants feeling that they have been 'beaten' into submission or disadvantaged in some way and, although they may appear to accept the negotiated solution at the time, they will certainly try to recover ground later, which could lead to more problems in the future. Having good negotiation skills is an essential characteristic of an effective project manager.

Be positive, always provide alternatives

If you do decide to turn a project down you need to assess the consequences and decide a damage limitation strategy. You need to identify clearly the reasons why you are unable to undertake the project, make sure you articulate them to senior managers and, where possible, provide alternative solutions that give senior managers a way out of the negotiation. Just refusing to do a project will do nothing for your credibility (or possibly your promotion prospects!).



A senior manager has asked you to undertake a project but you are already fully committed. The budget is insufficient, the team has already been chosen and you know some of the members of the team do not have the relevant skills. How would you turn down this project and still retain credibility and the confidence of senior management? Use Table 5.3 to record your thoughts.

Table 5.3 Issues to consider before taking on a project

What are the issues?	What are the alternatives?	How will you communicate this to senior management?

What do you do if you have to take the project on?

There may be occasions when you have no choice about whether you will take on a project. If you find yourself in this position, it would be advisable to analyse the reasons why you have no choice and try to avoid them in the future. A project manager should champion the projects they undertake and there will be little enthusiasm or energy if that person is forced into taking the project on.

However, if this situation arises you should still make your concerns known, provide alternative solutions or ideas, and ensure that senior managers are aware of, and record, the issues you have raised.

Q project tips

5.3 Planning your project

The importance of planning

The planning of a project does not start on the day the project starts. Planning needs to take place as soon as the project is conceived. Working through the business plan and identifying the resource, budget and staffing requirements at this early stage will help you to identify whether you need to spend further time developing this particular project.

When you have gone through this initial evaluation stage, and if you come to the conclusion that it is worth pursuing the project, you can adopt a more formal approach and compare the costs to the expected outcomes (carry out a cost–benefit analysis). The outcome from this initial review process should be a business plan that identifies:

- the reasons for taking on the project
- the options available
- the expected benefits of the project
- the expected outcomes
- an analysis of the risks involved
- the cost
- the timescale
- an assessment of the benefits compared to the investment.

Determining the size of your project

The size, duration, complexity and financial investment in the project will normally determine the level and difficulty of management, reporting and monitoring procedures. A large project (for example one running over a long time period, involving a number of team members and relying on the completion of one stage before another can continue) will require more formal project management than a small project (for example, over a week with a single person responsible for completion). A number of project management techniques are available and links are given in the appendix. However, PRINCE 2 is now accepted (for example by government departments) as the project management technique most frequently requested when undertaking government-funded projects. Links to PRINCE 2 are also provided in the appendix.

You need to identify the accepted project management systems and procedures used in your organisation or, more importantly, by the people funding the project. There is no point setting up a project management process and reporting procedures only to find out later that the people funding the project require you to use a specific project management technique and follow their reporting process.



Does your institution/organisation have a 'standard' project management system or procedure?

If it has, are you familiar with it?

If it doesn't, what project systems and procedures have been used successfully in the past?

Why do projects fail?

There are a number of reasons why projects fail. These include:

- there being no business case
- there being a poor or inaccurate business case
- lack of communications
- poor project management
- the project being high risk or cutting edge
- inaccurate costing
- lack of resources
- lack of commitment from team or senior managers
- there being an inadequate timescale
- over-optimistic outcomes
- conflict of interest
- hidden agendas.

There are two main ways to avoid project failure. First, you can learn from experience. This is time consuming and expensive but hopefully you do not repeat any earlier mistakes. Second, you can learn from the experiences of others; identify those people in your organisation who have managed a number of successful projects and make a point of talking to them, and learning from their experience. This method is quicker, less expensive and builds up partnerships with other project managers within your organisation.



The above are just a few of the reasons why a project will fail.

Think about projects you/others have been involved in that were not successful and try to identify the reasons why. Add your reasons to the list above. What action could have been taken to recover the project? Use Table 5.4 to record your answers.

Table 5.4 Template to use to identify why a project failed and how to recover it

Title of project	
Why did the project fail?	What could have been done to recover the project?

Identifying resource and personnel requirements

A significant number of projects, in particular cutting-edge ICT projects, fail because of relying too heavily on software or hardware that is still under development or not available at the start of the project. Long-term ICT projects also suffer from technical redundancy; what seemed like a cutting-edge ICT project 6 months ago can disappear into obscurity with the release of new hardware or software. You should always try to make sure that any key hardware or software is available before the project starts and that those responsible for it have some commitment to the project and can be brought to account if it is not delivered on time or to the expected quality.

As the project manager you need to assess the risk of starting a project without all the required resources being available and inform senior management of the implications if the resources fail to materialise.

If you have been involved in the selection of the project team you will be aware of its members individual strengths and weaknesses. When undertaking medium- and long-term projects you may also be required to identify any individual or group professional development requirements to ensure they have sufficient skills and competences to complete their individual tasks.

Communications

Good communications systems and agreed forms of communication are essential if any project is to be successful. There are now many more ways to communicate but projects still fail because vital information has not been transmitted or acted on. The increase in the number of communication techniques is often cited as the reason why communications broke down. When starting a project ensure that you agree with the team and key stakeholders the method(s) of communication you will use, the frequency and formality of that communication and the person responsible for acting on the communication. It is now common practice to send e-mails to the whole team, for example identifying an issue that needs to be resolved. But unless someone is made responsible for acting on the communication each member of the team assumes someone else is attending to it and nothing gets done.



Table 5.5 highlights some common methods of communication. Try to identify the method/s of communication you would use for your project, identify the reasons for adopting these and the frequency and formality of those communications.

Table 5.5 Methods of communication between project team members

Method of communication	Reason(s) for using this method	Frequency and formality
Telephone		
Fax		
E-mail		
Video conferencing		
Telephone conferencing		
Text		
Letter		
Computer-based – Skype/MSN messenger etc		
Blog		
Podcast		
Minutes		
Memos		

Identify the key stakeholders

All projects have stakeholders and it is important to understand the impact your project will have on them and ensure they are involved or kept informed. With small projects which you have initiated it may be that the key stakeholders are the learners, as what you are doing directly affects them. However, if your project alters the way in which education or training is delivered within your organisation, the organisation itself becomes a stakeholder and you need to ensure that senior managers are involved or kept fully informed.

Larger projects will have a number of key stakeholders and you need to ensure that you, as the project manager, are aware of their individual aspirations for the project. If you have a project steering group such stakeholders should be members and play a role in the way the project is managed and directed. Identifying the individual aspirations and priorities of key stakeholders at an early stage is important, as the outcomes of the project will be affected. For example, you may assume that 'cost effectiveness' is the priority and work towards a cost-effective solution. However, it may be that key stakeholders are from agencies such as Ofsted or the QIA, whose overriding priority is quality. Delivering a cost-effective solution that does not reach the quality expected may not be considered a success. Finding out who the stakeholders are, what they expect, and how involved they want to be in the project are important responsibilities of the project manager; the earlier this is accomplished the better.

Q project tips

5.4 Managing your project

Starting the project

A great deal of work should have been undertaken before any project gets under way. This pre-planning phase would include:

- developing the business plan
- selecting team members
- identifying resources
- agreeing the project aims and objectives
- agreeing the project outcomes
- agreeing the project plan and milestones
- agreeing the project time-scale
- communicating methods, frequency and formality
- the reporting process.

A formal start to the project (the 'kick off' meeting) where those involved (including key stakeholders) can ask questions and clarify roles can be far more effective than a gradual 'drift' into the project by individual team members. It helps to motivate people and makes it clear that the project has started and that there can be no confusion about who is doing what. You should also allocate time and finance for team-related activities within the project plan.

Selecting the team

As the project manager you need to be involved with the selection of team members. You also need to identify, and organise, any training requirements for individual members and the team as a whole. You should have already identified the range of skills required to undertake the project and the team members should reflect the range of skills required. If the team has never worked together before you need to ensure that all team members have relevant contact details, and that relationships are identified if collaboration is required to complete any stages of the project.

Team building

Motivating your project team and ensuring they work as a team rather than a group of individuals is an essential role of the project manager and should begin as soon as the team is in place. Individuals should be able to work as a cohesive team with the aim of achieving the project outcomes as efficiently and effectively as possible. Even when colleagues have worked with each other as a team on previous projects it is important to spend some time with members ensuring they are all committed to the project and conversant with its aims, objectives and expected outcomes. With any new project, do not make assumptions about the ability, motivation or availability of individual team members. Find out about and resolve any queries they have.

Managing stakeholders

The stakeholders are normally the people who will be directly affected by the project you are undertaking and it is worth taking a few minutes to identify who they are, how they will be affected, their anticipated outcomes and anything you can do to ensure they support the project. It is also advisable to ascertain any issues that may arise in the short, medium or long term. As the project manager you should try to ensure that the key stakeholders feel that they are participating in the project and have some responsibility towards the achievement of the outcomes.



Use Table 5.7 to identify the stakeholders within your project, how they will be affected, what they expect from the project, and any issues that may affect the success of the project.

Table 5.7 Identifying the stakeholders and how they will be affected by the project

Who are the stakeholders?	How are they affected?	What do they want from the project?	Identified issues

Managing risk

Before you start you need to ascertain if your project is low, medium or high risk; this will affect the assessment of risk and the agreed outcomes. The management of risk is part of the role of the project manager but also needs to be agreed with senior managers, the project steering group or project board.

There are occasions, especially with ICT projects, when project managers will agree to take on very high-risk projects in order to 'push the boundaries'. There have been many examples of high-risk projects within education and training that have been used to test new technology and delivery methodologies. They have provided a great deal of information for future projects and helped to integrate the findings into 'normal' delivery methodologies. However, as the project manager you need to ensure senior managers are aware of the risks involved. This will include determining how a project might be terminated (either at its planned conclusion or prematurely) including to provide useful feedback to others undertaking similar high-risk projects in the future.

Making and learning from mistakes

Project management is not complicated and anyone can become an effective project manager with a little thought and by following a few simple rules. Experience is also a good teacher and those new to project management can expect a few problems during the early stages of their associated professional development. Making and learning from mistakes is an important aspect of learning to become a good project manager. Making a mistake once and learning from it should be expected and supported. However, try to make sure you learn from the mistake and don't repeat it (senior management may not be so supportive next time!).



Is there a 'central repository' within your organisation where issues and lessons learned from previous projects are recorded?

If not, are you able to find this information?

Make a list of common issues and lessons learned from previous projects and see if any apply to your project.

Q project tips

5.5 Monitoring your project

Why monitor a project?

Projects need to be monitored for a number of reasons, including to:

- ensure that the agreed project aims and objectives are being achieved
- check the outcomes against agreed criteria
- revise the project aims, objectives and outcomes if required
- review staff and resource requirements
- provide early intervention to ensure success
- give help and advice to the project manager and team.

It is important to ensure there is the correct level of monitoring; over-monitoring is time consuming, expensive and can be demoralising for the people under examination.



Can you think of any projects you have been involved in that have been 'over monitored' or employed bureaucratic reporting processes?

What do you think were the reasons for employing this level of monitoring?

Monitoring options

A number of options exist for monitoring your project; a few of the key methods are shown below.

1. **Continuous monitoring** The business plan is used to monitor the progress of the project against agreed performance criteria. Although this method provides continuous information – and action can be taken immediately to correct any variance between expected and actual outcomes – this method is time consuming. It is only suitable for small projects and does little to motivate the person being monitored.
2. **Periodic team reviews** An agreed project-review time scale is agreed with individuals or groups working on specific parts of the project. An individual or member of the group is responsible for reporting any variance that may occur between the review periods and for reporting progress. This method gives more responsibility to the individual or team and allows project managers to take on larger projects or a number of projects at the same time.

Project steering groups

An effective and supportive project steering group can be an asset to any project. It can act as a sounding board for ideas and a conduit to senior managers and decision-makers, and can provide an objective outsiders' view about how to achieve the outcomes of the project. Phase project steering group meetings to match the project plan and take place when key milestones have been achieved.

Monitoring outcomes

There are three reasons for monitoring a project:

- to check progress of the project against the project plan, outcomes, business case etc
- to check the effectiveness and quality of the work undertaken
- to check expenditure and cost–benefit analysis.

The level, frequency and formality of the monitoring procedures and systems used will normally depend on the complexity and size of the project being undertaken.

A number of outcomes can result from monitoring a project:

- formal and informal reports
- formal and informal communications
- formal and informal updates of actions, risk, problems and other issues
- amendments to the original action plan, aims, objectives and outcomes
- amendments to the business case, resources or finance
- amendments to the cost–benefit analysis
- minutes of meetings.

Q project tips

5.6 Getting your project back on track

Identify the issues

If your project is not going to plan the first thing you need to do is find out why and clearly identify the issues that must be resolved. It may be that you can sort them out yourself by allocating additional time or resources. However, if the project is seriously affected, you will need to involve senior management or the project steering group. The majority of projects do not go exactly to plan and that is why monitoring the progress of a project is so important. Good monitoring and reporting at identified phases of the project will quickly highlight where and when it is going off track. Minor changes can be enough to correct any error if it is identified early enough and bring the project back into line with the project plan.



Within your organisation try to identify two projects that did not go to plan. If possible talk to the project manager, chair and steering group members to find out why and, in hindsight, what could have been done to bring the project back on track.

Have the aims, objectives and outcomes changed?

If action is taken at an early stage and the project is now back on track it should not be necessary to alter the aims, objectives and outcomes. However, it should be normal practice to review them, if only to confirm to the team that they are still working to the original plan.

Changes to the aims, objectives and outcomes may be required if you have identified significant difficulties. In these circumstances you should prepare a report to senior management or the steering group highlighting the reasons for the changes, ways in which the new project plan could be achieved and any alterations to the expected outcomes.

Confirm roles and responsibilities

If substantial changes have been made to the project it is worthwhile organising a meeting with all members of the team, to re-establish roles and responsibilities, and resolve any issues or concerns that individual team members may have. The meeting should be similar to the original 'kick off' meeting and members of the team should leave the meeting motivated and committed to the successful completion of the project.

Reaffirm or revise the project plan

Even if small changes are made to the project you should ensure all members of the team are aware of what they are and why they have been made. It is very easy for rumours to start circulating; if any of the team is unsure about what they are doing now or think a change has been made without them knowing about it, this could affect their performance.

If substantial changes have been made they should be reported and discussed when you hold the meeting to confirm roles and responsibilities.

Reaffirm or change the monitoring and reporting procedures and systems

It may be that problems have developed during the project because of insufficient or inappropriate monitoring and reporting systems and processes. It is advisable to review the monitoring and reporting systems after each phase to ensure that they are still relevant. If a project is going well you may even reduce the amount of monitoring you use. But think carefully before doing this; ensure the appropriate level of monitoring is in place and relevant to the complexity and scope of the project.

Communicate

You need to communicate problems affecting the project to everyone involved so that they are aware of them and what action you are taking to bring the project back on track. You also need to highlight any effect these problems will have on the expected outcomes of the project and enlist the support of senior management if additional resources are required. You should also highlight what actions you will be taking in the future to ensure the same difficulties will not reoccur.

Q project tips

5.7 Closing your project

Project report

Closing the project and disseminating the outcomes is an essential, if sometimes neglected, phase of the project life cycle. It is also a time to celebrate the outcomes of the project, highlight achievements and suggest new ways forward and perhaps new projects.

Normally the closing of a project will require a project report to be produced, including:

- an executive summary
- names of the project team, steering group membership and other contributions
- the business case
- the initial aims and objectives at the start of the project
- expected outcomes at the start of the project
- budget, time and resource allocation
- actual outcomes
- problems and issues encountered during the project
- solutions
- lessons learned
- transferable models of good practice
- the 'way forward'
- feedback and evaluation
- a conclusion
- recommendations
- a timetable for post-implementation review.

The above list is not exhaustive.

The actual headings, format and presentation of the interim and final reports should be decided at the start of the project as they will act as guidelines when collecting evidence, including any case studies. Don't leave the writing of the report until the last minute. If you have the headings and format of the report at an early stage of the project it is recommended you keep a draft document on file (for example electronically on computer) and add to it as things arise. Review this monthly and then complete the full report towards the end of the project.

Review and analysis

The review and analysis of any project will be easier if objective (measurable) performance criteria were identified at the start. For example it would be difficult to review and analyse the success of a project if the outcomes were described as:

The project will train some of the college staff to use ICT.

You would stand a much better chance of reviewing and analysing the success of a project if you said something along the lines of:

Between 3 January and 1 August 2008 three members of staff from the college teacher training department will undertake an initial needs identification analysis, identify and train a total of 25 second-year trainee teachers to use Microsoft PowerPoint for the production and delivery of interactive learning materials. The standard college self-assessment and lesson observation forms will be used to undertake three assessments per student during the project life cycle. Results will be recorded and made available from the head of the teacher training department in electronic format.

The above shows:

- the time-scale of the project
- the level of training
- the numbers to be trained
- the assessment process
- the evaluation process and criteria
- the benchmark at the start of the project
- the recording process
- a measure of success.

Lessons learned

The lessons learned during the project need to be identified, analysed and recorded to ensure that anyone undertaking a similar project in the future does not have to go through the same learning curve by making the same mistakes again. The lessons learned can help your organisation improve the quality and effectiveness of projects undertaken in the future and be disseminated as examples of good practice. It is important to include in the lessons learned those things that did not go well and highlight what actions you took to bring the project back on track. It is all too easy just to include the things that went well, which will not give a true picture of the project life cycle.

It is important to keep a log of the lessons learnt throughout the project rather than try to recall them at the end, as it will be very difficult to recall something that happened several months ago.

Make sure the 'customer' is happy with the results

Making sure the 'customer' is happy with the results of the project requires you first to identify who the 'customers' are. You should have done this as part of making a business case and it should be possible to confirm that other groups have not entered the 'customer' category. Your customer may be the person financing the project or the users of the project outcomes. Whoever your identified customers are, they need to have a say about the perceived benefits of the project and determine if it achieved the desired results.

Tie up all the loose ends

Before you complete the project and have it signed off (by senior management or the project steering group) you need to ensure that all the outstanding activities have been completed or allocated for completion. Pay attention to administrative tasks, such as paying contractors or outstanding invoices. You should also ensure that the allocated budget has been accounted for and any under- or over-spend is highlighted to enable the project steering group or senior manager to make decisions.

Ensure that the team members have completed their allocated tasks. Provide any necessary assistance to them if required and thank them for all their hard work.

Ensure you provide decision-makers with all the information about any outstanding work or issues and get the project signed off in writing.

Post-implementation review

A post-implementation review of the project should take place (usually between 6 and 12 months after the project has been formally closed). The aim of the PIR is to determine if the project delivered the anticipated benefits contained in the business case at the start of the project. It should also highlight any ways in which the project outcomes could be improved or issues that have arisen since the project was implemented.

The PIR is a neglected part of project management; funding and resources should be allocated for this stage at the start of the project or it will not take place.

Dissemination

See Q project tip number 8.

Q project tips

5.8 Disseminating your project outcomes

Celebrating success

There are occasions, including within education and training, when the outcomes from very successful projects do not get disseminated. There are many reasons for this (including pressure to move on to the next project; commercial sensitivity; the level of success not being recognised; funding restrictions etc). However, if the project has been successful and there are lessons to be learned, it is always a good idea to disseminate this good practice in-house and, if applicable, to the wider community. A large number of projects are funded by the public purse via the government or its agencies and it is always good practice to disseminate the results of these projects to enable others to learn from your achievements.

Even projects that have not gone to plan can highlight important issues and, if presented properly, can make a valuable contribution to the body of knowledge and prevent similar projects failing in the same way.

Using technology

One of the easiest and most effective ways of disseminating project outcomes is via the internet, including by using the organisation's website. If your project has delivered significant outcomes you will inevitably receive a number of requests for the report and other information. It can be very time consuming and expensive to have to copy information on request and post it to the recipient. It is much easier to have the information on the institutional website and refer requests to the location and any associated document downloads.

If the outcomes are 'data rich' media they can be circulated using a CD-ROM or DVD that can be posted on request. These media are useful if there is video or audio content.

E-mail is another common way of disseminating reports and publications. If the information is contained in one file on your computer, you can easily respond to requests by attaching it to an e-mail reply.

Project report and executive summary

The end of project report is probably the most requested document and you should be sure to keep a copy of the agreed final report at the end of each project. This is not only good practice for the dissemination of the project outcomes but also as a record of the projects you have undertaken. At some stage you may need to refresh your own or others' memories about a particular project or identified issue and solution.

A separate executive summary can be useful as not everyone will have time to go through the full report; you may also need the summary when applying for other project work or to highlight your experience.

Project dissemination event

If you intend to have a project dissemination event this needs to be highlighted at a very early stage in the project life cycle. The organisation, resources, personnel, room rental, food and other expenses can soon mount up and even holding a small dissemination event in your own college could cost hundreds of pounds if loss of staff time for attending the meeting is taken into consideration.

External marketing and publication

In some instances it can be more cost-effective and efficient to use an external marketing organisation to disseminate the findings of your project. You need to undertake a cost-benefit analysis before committing time, resources and finance to a large dissemination activity.

Many colleges have a Leisure and Tourism or Business Studies department and it may be worth asking if they would like to organise an in-house dissemination activity as part of their course activities.

National organisations

The findings from your project could be of significant interest to government-sponsored or other agencies, which would consider disseminating your project outcomes on your behalf. It is worth contacting agencies, organisations, subject-specific publication houses or potential sponsors to see if they would be willing to help disseminate your findings and they may also be interested in funding any of the continuing research identified in the findings.

6 Staff development exercises – practical reinforcement exercises to undertake with your colleagues

- 6.1 Identify your institutional project management model
- 6.2 Successful project management
- 6.3 Identify the benefits
- 6.4 Develop your systems
- 6.5 Discover good practice
- 6.6 Estimating costs
- 6.7 Identifying the project team
- 6.8 The team service level agreement
- 6.9 Developing objective performance criteria
- 6.10 Identifying time management issues and solutions
- 6.11 Team management
- 6.12 The final project report
- 6.13 Advantages and disadvantages of project management software
- 6.14 Project management software cost–benefit analysis
- 6.15 Change management

6.1 Identify your institutional project management model

- Identify three projects that your institution undertook recently.
- Note the names of the project managers, team members and senior managers on Post-it notes.
- For each project, arrange the Post-it notes on a flip chart and draw in the lines of communication and reporting.
- Note any common features between the projects.
- Identify any transferable models of good practice that have been produced during the projects.

6.2 Successful project management

- Identify projects that have been successful.
- Identify any common links between the management structure and the successful projects.
- Identify any transferable models that could be used to manage new projects.
- Try to analyse why the project was successful and identify common success criteria.

6.3 Identify the benefits

For this exercise you will need a copy of your institutional plan.

- Do all the projects identified in Exercise 6.1 support the institutional plan?
- Of those that do, what benefits will they have for the institution and what might be the possible impact if they are successful?
- If any of the projects do not support the institutional plan, can you identify the benefits they might bring to your institution?
- If projects do not support the present institutional plan, does it need to be revised? If so how?

6.4 Develop your systems

- Develop a flow chart that highlights the way projects are managed in your institution.
- On the flow chart, indicate who is responsible for what.
- Note any common features and the levels of reporting used.
- Note whether any changes to your institution's project management system could be made, and discuss these changes with colleagues.
- Consider whether 'informal' project management systems should be used or developed.

6.5 Discover good practice

- Draw up two lists: one explaining why projects at your institution succeed, the other identifying the reasons why they fail.
- Assess whether any of the good practice can be transferred to other projects.
- Assess whether any of the bad practice can be eliminated.

6.6 Estimating costs

- Identify the people in your institution who are responsible for estimating project costs.
- Identify the projects with which they have been involved.
- If possible, obtain a copy of the original bid and the final report for each project.
- If standard institutional costings (staff time, administration, specific resources, etc) are available, obtain copies of them.
- Working in small groups, discuss the projects with which the institution has been involved. Try to identify:
 - any transferable models of good practice
 - any common costing errors in the projects undertaken
 - ways of overcoming those errors
 - common institutional costs.

6.7 Identifying the project team

- Try to identify the characteristics required by members of a project team.
- If you are already working on a project, see whether you can identify any of the following characteristics in your team (note that the list is not exhaustive; you may need to add other characteristics):
 - thinker
 - pragmatist
 - pessimist
 - reflector
 - theorist
 - optimist
 - activist
 - negotiator
 - enthusiast
 - innovator
 - fixer
 - questioner.
- Draw up a list of the characteristics of your team members. Alongside each characteristic, identify the positive and the less positive attributes that each team member brings to the project.

Websites that give advice on learning styles

www.support4learning.org.uk/education/learning_styles.cfm

www.lseducation.org.uk/user/order.aspx?code=041543&src=xoweb&cookie_test=true

Both links were available on 19 March 2007.

6.8 The team service level agreement

- Discuss the advantages and disadvantages of developing SLAs for team members.
- Working in groups, use Post-it notes to identify the main requirements that should be included in a SLA.
- Discuss the type of penalties that are appropriate.
- Bring the groups together and decide the main requirements and appropriate penalties for the SLA.

6.9 Developing objective performance criteria

- Looking at past project bids, try to identify any non-objective performance criteria used (see measurable performance criteria in section 2.5 for an example).
- Make a list of them, and alongside write the corresponding objective performance criteria. Discuss in groups the differences between the two.

6.10 Identifying time management issues and solutions

- Working in small groups, use Post-it notes to identify what you consider to be the main issues regarding time management.
- Put the Post-it notes onto flip-chart paper and try to group them into areas of concern.
- Display the results and, working as one group, try to identify common time management issues.
- Draw up a list identifying the common time management issues, and discuss ways of overcoming the problems you have identified.

6.11 Team management

- Working individually, identify the most important features of team management and write them onto individual Post-it notes.
- Form groups and collectively identify seven priority features.
- Identify how many of these features are evident in your organisation.
- For each of the seven priority features, suggest ways of improving team management in your organisation.

6.12 The final project report

- The list below includes some headings you may wish to include in your final report. Add any that you think are relevant to projects with which you have been involved. Try to identify the headings that represent priority areas, and allocate time to complete each stage.
- Headings that might be included in the final report of a project:
 - Executive summary
 - Project team, steering group membership and other contributions
 - Business case
 - Initial aims and objectives at the start of the project
 - Expected outcomes at the start of the project
 - Budget, time and resource allocation
 - Actual outcomes
 - Problems and issues encountered during the project
 - Solutions
 - Lessons learned
 - Transferable models of good practice
 - The 'way forward'
 - Feedback and evaluation
 - Conclusion
 - Recommendations
 - Timetable for post-implementation review.

6.13 Advantages and disadvantages of project management software

- Make a list identifying the advantages and disadvantages of using project management software.

6.14 Project management software cost–benefit analysis



Working with the list you compiled in Exercise 6.13, identify the costs involved with using project management software, and the benefits or savings it might bring to your institution.

6.15 Change management

During your career you will at some point have been affected by change. At the time you may have wondered what was going on and how these changes were being identified and implemented.

Think about a period of change that affected you, or that you helped to implement, and identify the number of change strategies that were employed and the reasons they were used.

You may also want to identify, in hindsight, what strategies could have been employed that would have assisted the process. Use Table 6.1 to fill in your answers.

Table 6.1 Strategies used to assist in making changes

Brief description of the change that took place:

What change strategies were employed?	Was the strategy effective? If not why?	Was the outcome better? If not why?	What could have been done to make the change more effective?

Appendix Mapping this publication to the ePD framework and PRINCE 2 methodology

M = Management, P = Practitioner

Q unit	Initial headings for sections	Level	PRINCE 2 references ²²	Section in this publication
11.3.4	Change control – contract	M	285 – 9/315 – 18	3.3
11.3.4	Change management – organisation	M		3.3
11.1.1/11.2.1/11.2.4	The business case	M	197 – 201/243	2.1
11.2.2/11.2.5/11.3.4	Monitoring progress	M	209/224/229	3.2/Sheet 5
11.1.3/11.2.5/11.3.1/ 11.3.3	Managing projects – steering group/board	M	240/248	3.4
11.2.1/11.3.4	Project planning	M	55	2.2
	Quality	M	266 – 73/338	3.6
11.1.1	Risk management	M	118 – 90/255 – 7	2.3
	Contract management	M	109/289/318	2.4
11.1.3/11.1.4/11.3.1	Managing stakeholders	M	10/339	3.5
11.1.2/11.3.4	Measuring success	M		4.3
Q unit	Initial headings for sections	Level	PRINCE 2 references	Q publication
11.1.1	How to estimate time/resources/personnel	P/M		2.1/1.7
11.1.1/11.2.1/11.1.2	Measurable performance criteria	P/M	102	2.5
11.1.1/11.2.1	Aims, objectives and outcomes	P/M		2.5
11.2.5/11.1.4	The role of the project manager	P/M	401	2.6
	Project management techniques	P/M	387	Sheet 5 and 4
11.1.1	Assessing risk	P/M	387	2.3
	Formal vs informal project management	P/M		1.9
11.1.2	How to evaluate and measure success	P/M		4.3
11.2.2	Disseminating success	P/M		4.4/Sheet 8
	Customer satisfaction	P/M		3.6
	Why take on a project	P		1.4
Q unit	Initial headings for sections	Level	PRINCE 2 references	Q publication
11.2.2/11.2.6	Initial project/skills assessment	P		
11.2.2	Developing a simple business case	P	197 – 201/243	2.1
11.2.4/11.2.3	Identification of staff and resources	P		1.8
11.3.2	Negotiation skills	P		Sheet 2
11.3.3	Managing the project	P		Sheet 4, Section 3
	How to say no	P		Sheet 2
11.1.3	Building and leading a team	P		1.8
11.1.4	Needs analysis, CPD	P		1.8
11.3.1/11.3.2	Team relationships	P		1.8
11.1.1/11.2.1	Producing a simple budget plan	P		2.1
11.1.2/11.2.1	Planning a successful project	P		2.2
11.2.2/11.2.5/11.3.1	Communications and working practices	P		Section 3
11.4.3	Closing the project	P		Section 4

Q unit 11 Undertake learning and development projects²³

11.1 Develop a proposal

- 11.1.1 Establish the need and specify the proposal's scope, objectives and outcomes.
- 11.1.2 Identify the beneficiaries, the potential benefits and ways to measure if they have been achieved based on quality evaluation criteria.
- 11.1.3 Involve relevant specialist staff in the development of proposal plans consistent with the scope and objectives.
- 11.1.4 Collect information about beneficiaries, their knowledge and skills, preferences and accessibility needs, and identify their learning needs and requirements.

11.2 Action plan the e-learning proposal and identify monitoring opportunities

- 11.2.1 Divide the work into manageable, measurable and achievable tasks related to the outcomes.
- 11.2.2 Establish links, work methods, schedules, evaluation methods, and monitoring and dissemination opportunities.
- 11.2.3 Perform a self assessment to determine what professional knowledge and skills are required.
- 11.2.4 Secure any resources, budgets and approvals necessary to complete the proposal.
- 11.2.5 Establish clearly the limits of own and other people's authority within the proposal.
- 11.2.6 Ensure appropriate professional or skills updating for those involved in the proposal.

11.3 Implement the proposal for a specified area

- 11.3.1 Keep relevant colleagues informed about the proposal and involve them in problem solving.
- 11.3.2 Negotiate support from appropriate sources.
- 11.3.3 Provide advice and guidance to help colleagues meet their responsibilities.
- 11.3.4 Monitor carefully the progress of the proposal against plans and make any necessary adjustments with the knowledge and agreement of colleagues.

11.4 Evaluate and report using the findings to review and improve quality

- 11.4.1 Complete all necessary procedures relating to finance, resources or personnel to close the project and acknowledge the contribution of colleagues.
- 11.4.2 Gather feedback from others and involve them in reviewing the project.
- 11.4.3 Measure the extent to which the project objectives have been achieved according to agreed quality criteria, costs and schedules in the proposal; and how they have impacted on the quality of teaching and learning.
- 11.4.4 Disseminate findings according to agreed procedures.
- 11.4.5 Use the results of the evaluation to review and improve the quality of teaching and learning.

Web links

DfES programme and project management

The site should help you to work through the various stages of your programme or project, from start up to your closure reports.

www.dfes.gov.uk/ppm/index.cfm

e-learning and technology

A range of information and links regarding the integration of e-learning, the use of new technology and continuing education.

www.learningtechnologies.ac.uk

e-Learning Centre

In the e-Learning Centre's information section you will find a large collection of selected and reviewed links to e-learning resources.

www.e-learningcentre.co.uk/eclipse/Resources/pm.htm

JISC project management

The JISC project management infokit is aimed at people who are managing a project for the first time and people with some experience of projects who recognise the need for a structured approach.

www.jiscinfonet.ac.uk/InfoKits/project-management

Learning and Skills Web

Discover how easy it is to find news, information and resources with Learning and Skills Web. Save valuable preparation and research time.

www.lsweb.ac.uk

Office of Government Commerce

Over recent years programme and project management professionals have seen a proliferation of project management qualifications and a significant interest in programme management. In this guide you will find nationally and internationally recognised qualifications – generic, industry-based, method-based and others, which focus on one particular aspect of technique.

www.ogc.gov.uk/index.asp?id=1000854

Project management fact sheets

A wide selection of fact sheets and other downloads.

www.egovernment.tas.gov.au/themes/project_management

Project management scalable methodology

The scalable methodology of the US Project Management Institute introduces the key principles of project management and gives guidance on how to fit the various tools and techniques available to your particular project.

www.hyperthot.com/pm_meth.htm

QIA Excellence Gateway

The QIA's Excellence Gateway will become the place for advice, information and support for those involved in post-16 learning and skills provision.

It will increasingly provide:

- examples of good practice from your peers
- networks to support your self-improvement agenda
- suppliers of improvement services
- resources, tools and materials to support teaching and learning.

<http://excellence.qia.org.uk/>

WorldWideLearn

Online project management training. Course topics include: managing multiple projects, project teams, project management standards, Project Management Professional (PMP) certification, scheduling, estimating and more.

www.worldwidelearn.com/business-course/project-management-training.htm

Websites that give advice on monitoring projects

Information on monitoring and control –
www.dir.state.tx.us/eod/qa/monitor

Guidelines for managing and monitoring major IT projects –
www.ssc.govt.nz/display/document.asp?NavID=166&DocID=2726

Dealing with stakeholders –
www.dfes.gov.uk/ppm/index.cfm?fuseaction=content.view&ContentID=11&SiteID=2

DfES Managing Progress –
www.dfes.gov.uk/ppm/index.cfm?fuseaction=content.view&CategoryID=3&ContentID=181&SiteID=2

All links were available on 19 March 2007.

Bibliography

- Berkun S (2005). *The art of project management*. O'Reilly. At www.amazon.co.uk/exec/obidos/ASIN/0596007868/qid=1128944642/sr=1-2/ref=sr_1_11_2/202-1534334-1178265#product-details (accessed 20 March 2007).
- Burke R (2003). *The project manager: mastering the art of delivery*. John Wiley and Sons Ltd. At www.amazon.co.uk/exec/obidos/ASIN/0470851244/qid=1128944642/sr=1-9/ref=sr_1_11_9/202-1534334-1178265 (accessed 20 March 2007).
- Chatfield C (2003). *Microsoft Project 2003 step by step*. Microsoft Press. At www.amazon.co.uk/exec/obidos/ASIN/0735619557/qid=1128944642/sr=1-3/ref=sr_1_11_3/202-1534334-1178265 (accessed 20 March 2007).
- Higher Education Funding Council for England (1998). *Information systems and technology management value for money study*. HEFCE.
- JISC (nd). Project management infokit. At www.jiscinfonet.ac.uk/InfoKits/project-management/index_html/#what-is-a-project (accessed 20 March 2007).
- Kliem RL (1998). *Project managers' practitioner's handbook*. Amacom.
- Kotter JP, Schlesinger LA (1979). Choosing strategies for change. *Harvard Business Review*, March/April, 106–14.
- Lake C (1997). *Mastering project management*. Thorogood.
- Lock D (1996). *The essentials of project management*. Gower.
- Lockitt B (1999). *The right tools for the job*. Learning and Skills Development Agency.
- Lockitt W (2000) *Practical project management for education and training*. Learning and Skills Development Agency.
- Lockitt W (2004). *Change management*. RM Ltd.
- Maylor H (2002). *Project management*. 3rd edn. FT Prentice Hall. At www.amazon.co.uk/exec/obidos/ASIN/0273655418/qid=1128944642/sr=1-5/ref=sr_1_11_5/202-1534334-1178265 (accessed 20 March 2007).
- Office of Government Commerce (2005) *Managing successful projects with PRINCE 2*. OGC.
- Porter S (2001). *Project management for dummies*. Hungry Minds Inc. At www.amazon.co.uk/exec/obidos/ASIN/076455283X/qid=1128943022/sr=1-1/ref=sr_1_11_1/202-1534334-1178265 (accessed 20 March 2007).
- Project Management Institute (2004). *A guide to the project management body of knowledge*. Project Management Institute. At www.amazon.co.uk/exec/obidos/ASIN/193069945X/qid=1128944642/sr=14/ref=sr_1_11_4/202-1534334-1178265 (accessed 20 March 2007).
- Stevenson N (2003). *Project 2003 for dummies*. Hungry Minds Inc. At www.amazon.co.uk/exec/obidos/ASIN/0764542494/qid=1128944642/sr=1-6/ref=sr_1_11_6/202-1534334-1178265 (accessed 20 March 2007).
- Thurley K, Wirdenius H (1973). *Supervision: a reappraisal*. Heinemann.
- University of Salford (2003). *Guidelines to inform the development of e-learning in the NHS*. NHS Information Authority.
- Yeates D, Cadle J (2004). *Project management for information systems*. FT Prentice Hall. At www.amazon.co.uk/exec/obidos/ASIN/0273685805/qid=1128944642/sr=1-7/ref=sr_1_11_7/202-1534334-1178265 (accessed 20 March 2007).

Glossary

- ALI** Adult Learning Inspectorate (www.ali.gov.uk)
- ALP** Association of Learning Providers (www.learningproviders.org.uk)
- ALT** Association of Learning Technology (www.alt.ac.uk)
- APEL** accreditation of prior experiential learning
- APL** accreditation of prior learning
- blended learning** learning that uses a combination of methods, particularly including e-learning and face-to-face interaction
- CEL** Centre for Excellence in Leadership (www.centreforexcellence.org.uk)
- Cert Ed** Certificate in Education: non-subject-specific qualification that gives qualified teacher status within sector
- CoP** community of practice
- CPD** continuing professional development: CPD relates to post-qualification professional practice and is achieved in many diverse ways
- DfES** Department for Education and Skills (www.dfes.gov.uk)
- eCPD** continuing professional development with a specific focus on e-learning
- e-learning** electronic learning: learning supported or enhanced through the application of information and communications technology (LLUK definition)
- ePD** e-learning professional development: relates to the development, by teachers and other learning support staff, of an ongoing skills or knowledge set for using technology to enhance the learning experience
- e-Skills UK** sector skills council (SSC, qv) for IT (www.e-skills.com)
- e-tools** hardware or software used to support or enhance teaching and learning
- FE** further education
- FENTO** Further Education National Training Organisation, superseded by LLUK (qv)
- HEI** higher education institute
- ICT** information and communication technology
- IfL** Institute for Learning (www.ifl.ac.uk): professional body for teaching practitioners in post-compulsory education and training (further education, work-based learning, adult and community learning, the voluntary sector, etc). The IfL is currently establishing the framework that will support the registration of teachers and conferral of QTLS (qv) from September 2007 as outlined in *Equipping our teachers* (DfES November 2004).
- ILT** information and learning technology: the application of ICT to teaching and learning; also e-learning + e-leadership (LLUK definition)
- IPD** initial professional development
- ITQ** Information Technology Qualification: NVQ for IT users, developed by e-Skills UK (qv)
- ITT** initial teacher training
- JISC** Joint Information Systems Committee (www.jisc.ac.uk)

- JISC – RSC** JISC Regional Support Centre (www.jisc.ac.uk/rsc)
- LLUK** Lifelong Learning UK (www.lluk.org.uk): sector skills council responsible for the professional development of all those working in libraries, archives and information services, work-based learning, higher education, further education and community learning and development; see also SSC
- LSC** Learning and Skills Council (www.lsc.gov.uk)
- LSDA** Learning and Skills Development Agency, see LSN
- LSN** Learning and Skills Network (www.lsneducation.org.uk): since April 2006, programmes, research, training and consultancy projects formerly carried out by LSDA have been delivered by LSN.
- MLE** managed learning environment: refers to the whole range of information systems and processes of a college or training organisation that contribute directly, or indirectly, to learning and the management of that learning; an MLE incorporates a virtual learning environment (VLE).
- Moodle** open source software course management system or VLE (qv)
- NIACE** National Institute of Adult Continuing Education (www.niace.org.uk)
- NLN** National Learning Network (www.nln.ac.uk): national partnership programme designed to increase the uptake of ILT (qv) across the learning and skills sector in England
- NVQ** National Vocational Qualification
- Ofsted** Office for Standards in Education (www.ofsted.gov.uk)
- PCET** post-compulsory education and training
- PGCE** Postgraduate Certificate in Education: non-subject-specific qualification that gives qualified teacher status to graduates
- QA** quality assurance
- QCA** Qualifications and Curriculum Authority (www.qca.org.uk)
- QIA** Quality Improvement Agency (www.qia.org.uk)
- QTLS** Qualified Teacher Learning and Skills: from September 2007, all new entrants to FE teaching will be expected to work towards this new award
- SSC** sector skills council: SSCs are independent, employer-led UK-wide organisations licensed by the Secretary of State for Education and Skills to tackle the skills and productivity needs of their sector.
- SSDA** Sector Skills Development Agency (www.ssda.org.uk)
- TechDis** JISC-funded advisory service on accessibility and inclusion (www.techdis.ac.uk)
- VLE** virtual learning environment: system that supports a range of learning contexts, from conventional, classroom implementation to offline, distance learning and online learning

Putting the Q into quality project management has a focus on e-learning but it can be applied to any project. It is a valuable resource for topic 11 of the professional development framework for e-learning (ePD), 'Undertake an e-learning development project' and where possible, mapping to the PRINCE 2 project management methodology.

Putting the Q into quality project management covers a wide range of skills and the practical aspects of doing a project which is seen as one of the best forms of CPD available for the development of skills 'by doing'.

