Running Successful

Projects

in the

Voluntary Sector

A guide for project people
in the
charitable and voluntary sectors

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Introduction

Projects are now a fact of life for organisations in the voluntary and community sector. Changing patterns of funding mean that it's becoming common for such organisations to develop their work and secure funding by developing specific projects.

This means that voluntary organisations have to be more professional about how they manage projects, for two reasons. Firstly, to make sure they deliver what they want to deliver to their clients; and secondly, to demonstrate to their funders that they are using the money in an effective way.

An organisation that manages projects effectively, and can demonstrate it, will do well and will find it easier to attract more projects, and should find it easier to comply with funders' monitoring requirements.

This book describes the concepts of project management with some thoughts on how they apply to the third sector. It is intended as a practical guide so it's not full of theory. It was developed from my successful course in project management.

What follows in this book applies to ALL projects no matter how big or small, and whatever their subject. But I urge you not to follow it all slavishly - some of the ideas and processes are more appropriate than others for different projects. For example, you don't need to be too formal about inter-team communication if you only have a couple of team members and you all work in the same office. But if your team is geographically spread you will need to take much more care over how you communicate with them, and they with you. Equally, you don't need a 40 page project brief to cope with a small project. The important idea here is to scale the processes sensibly.

Another point to make here is that a lot of voluntary organisations aren't big enough to have dedicated project managers. It is entirely possible, even very likely, that you are project manager, office manager, scheme administrator and lots more. If this is the case, please don't be irritated when I say things like '...when you hand the project over to the operational manager…' and you are both project and operational manager. Think of it as which hat are you wearing. I have always found this approach useful because it allows some clarity of thought.

Take what you need from this book and any other source material you read, and apply the information in a way that suits you and helps you to perform effectively.

Definition of a project

Before we go any further let's agree on what a project is or isn't. If I were delivering this material as a training course to you in person this is where I'd go to the flipchart and make you come up with ideas. But since I'm not, I offer here a good definition of a project.

> **A project is a one-off, non-repeated activity or set of tasks, which achieves clearly stated objectives within a time limit.**

From this definition you can see that a project is a set of non-routine activities with a beginning and an end. This project is inflicting a particular change on the world. When the project's finished, the world will not be the same. And because there is change, there is always some risk or uncertainty and, as we shall see, managing the risks is a major part of a project manager's workload.

There's an implication in the definition that a project has a supplier and a customer. If you're putting a new day centre together, then your clients can be considered as your customers. So, too, can your funders. If you're working for a large charity and putting in a new payroll system, then your customers could be your staff, your HR department, etc. Sometimes it's not easy to identify who is who, but it's really important to keep this concept in mind, as we shall see later when we consider the project's stakeholders.

The major difference between a project and any other sort of activity is the 'handing over of the keys'. I have this image in my mind of the project manager at the end of the project handing over a bunch of keys to her customer, turning her back and walking away – the project is complete. Not all projects have keys but the concept is worth holding on to. A project finishes and you walk away from it. Walking away from it in a sensible and controlled way is the subject of a later chapter. Again, if you are both project and operational manager, it's still worth thinking like this. It makes it easier to close down the project properly and move on.

Projects usually involve teams of people working together who don't normally work together, which can be fun, and there are invariably constraints put on the work, time and/or budget.

What is a project?

Imagine that CheapCo are building a new superstore in your town. Building the store is clearly a project. There is a definable change that CheapCo are inflicting on the world. The store isn't there now but it will be one day. There is a set of tasks to achieve the overall objective, there is clearly a budget and there is a timescale. At some time somebody will hand over a set of keys to someone else and that first someone will walk away from the building. The project will be complete.

Now what about running the store? Assuming it's not open 24 hours a day you could argue that each individual day is a project because each day is different to the one before. I think this is stretching the definition to breaking point because the day to day issues are so similar. Running the store is an operational issue and because the skills involved are different, I argue that it isn't a project.

Building the new CheapCo involves all sorts of people who would not normally come together: architects, planners, builders, etc. Once the store is open and running these people are no longer needed.

Dimensions of a project

Any project is a juggling act between time, budget and scope.

Time

This is pretty obvious. Every project will have a time element. This may be a 'brick wall' date that you just cannot miss, perhaps a well-publicised launch date where missing it would cause your organisation deep embarrassment; or the introduction of a new payroll system that has to be in and working by the end of the financial year. It might be a self-imposed target. If you've worked through the plan and you can complete your project by a certain date, missing this date would dent your pride but would not seriously inconvenience the organisation. The circumstances of your project determine how flexible you can be with time.

Budget

Budgets are tight – fact. In the voluntary sector there is never a surplus of money so compromising the budget is not to be taken lightly. It's rarely possible to extract more money from your customer. More often than not you just have to make do with what you have. However there are always ways to tinker with the budget. For example if you budgeted for a member of staff from month 1 but did not appoint until month 3 you have the unspent salary as a contingency. On the flip side, presumably you needed that person in month 1, so you have other issues with the work that didn't get done. But you may be able to use that contingency in a useful way.

Scope

The scope of a project is essentially what you're trying to deliver.

If our project is to deliver a writing instrument we may start off looking to deliver a Waterman fountain pen. In my opinion such a pen is a work of art, beautiful to look at and to hold and a joy to write with. But as time goes by and things start to go wrong, it's important to remember that our objective is to deliver a writing instrument and not a Waterman fountain pen. In order

to deliver our project on time, we look at the scope and realise that we can still deliver a writing instrument if we select a Parker biro. It's still a quality product, writes well, is reliable and fit for purpose, albeit in a less elegant way. We have not compromised the quality of the product, but we have reduced the scope of the project.

We can apply this (admittedly strange) metaphor to our voluntary sector projects. If time and budget conspire against us then as long as we deliver the "writing instrument" we have delivered on the project. The worst thing to deliver would be half a fountain pen.

Consider a website project. Let's say the original concept was to have an all-singing, all-dancing site with lots of fancy features. If the project starts to run behind schedule you can recover the time by reducing the "scope" of the product. This doesn't mean you compromise with the information on the site but you could take out some of the fancy extras. This would reduce the amount of work and therefore could bring you back on schedule. It is this sort of scope compromise that is possible and acceptable and which works.

This sort of approach may also give you the opportunity to run a follow-up project; in this case you might "enhance" the website, to include features you've had to postpone as well as exciting new features!

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The job of project manager is to deliver the project on time, on budget and to the full scope. As the project develops real life will start to deviate from your plan and you will find you may need to compromise one of these three to recover your programme.
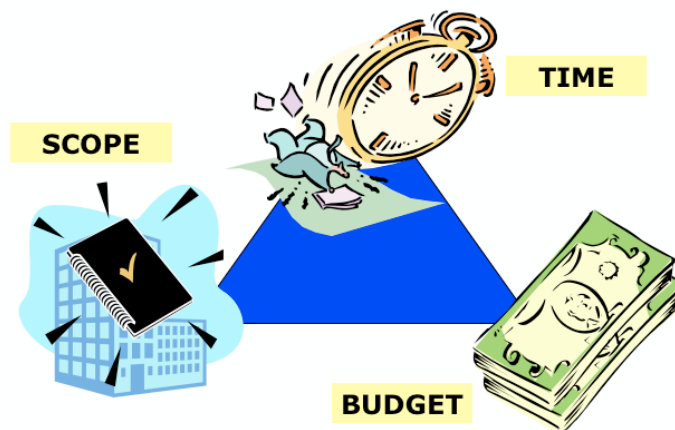

Figure 1 – Dimensions of a project

The golden rules

I have a couple of golden rules which have served me very well and I recommend them to you.

This is the first rule and if there could only be one rule, this would be it.

> ## RULE 1 - NO SURPRISES

The very best project managers know what is going on. They find out by being with the people doing the work, talking to them, understanding what's happening and what the risks and issues are at first hand. Because they are on top of things they know what is happening in the project, what is coming up, what is likely to go wrong, and what they can do about it if it does.

Adopting this rule means you can sleep at night without worrying about what might be lurking in the future waiting for a good moment to ruin your day. Believe me, the last thing you want

is for your chief executive/chair of trustees/whoever to call you and tell you of some disaster that's befallen your project. The ideal scenario is they call you to tell you and you reply that you are aware of the situation and have taken the appropriate actions to recover. How impressive is that?

You need to know what is going on all the time, be able to predict when something is about to go wrong, and have a plan ready to recover from it. You don't get that by sitting at your desk. Get out there!

RULE 2 - KISS

This is not an invitation to get amorous; it's an acronym for Keep It Simple, Stupid!

The goal of a project manager is to get the job done, not to generate tons of paper or hours of meetings. Paper and meetings are necessary but they're not the objective! The simpler you keep things the easier they are to keep track of and the fewer surprises you'll have. It's all too easy to get side-tracked into producing lots of reports and plans and stuff. Don't! Keep sight of the purpose of the project and remember what you are there to deliver.

Tools to help you

There are only 3 tools you need to be a successful project manager

1. Structured approach
2. Pencil
3. Paper

You need a structured approach to make sure you cover everything you need to cover in the right order, and you need to write some stuff down. That's it. All the other tools that are available, including software, have the potential to make your life easier – sometimes. Software enables you to put all the information in one place and is a great help to schedule the project. But if your project is small, then using some of the more sophisticated tools can just make your life harder. We will cover software in more detail later; we're still in the introduction!

Stuart's software tips

Even if you're not going to use project management software to manage the project it can be a good idea to produce the project plan using it – the pictures and diagrams that it generates look really impressive, and if you're bidding for funding they make your organisation look really professional. If it helps you get the grant, go for it.

AND…. Never pay full price for your software. If you're a registered charity there are plenty of organisations out there that will sell you software at considerable discount. Check the 3rd Sector Skills website (3rdsectorskills.com) for some links.

Methodology

A methodology is a set of processes that together give you a structured way of running a project. It's this structured approach that helps you bring order to managing a project.

Big industry has developed its own methodologies over the years and usually uses them to good effect. In the third sector, PRINCE2 is rapidly becoming a standard methodology. It is a process driven approach to project management. If you see your career staying with project management you may want to consider doing the PRINCE2 courses and getting the

qualifications. The learning will certainly help you with your current job and the qualification will help your CV to get through the first sift when you're looking for something new.

This book describes a methodology which is pragmatic and which has shown itself to work for small to medium sized projects. It can easily be extended to cope with larger projects and we'll look at this towards the end of the book. Although some of the terms may be a little different, nothing here contradicts anything in PRINCE2.

Paperwork

Paperwork is essential to a successful project because projects are run by people, for people. And people are sneaky, have selective memories and hidden agendas; you don't want to be caught out.

You need some stuff written down. You can't remember everything. In fact there's a definite limit on what you can remember. I've always liked the story about Albert Einstein who (it is said) could not remember his own phone number. "I can always look it up in the directory" was his response when questioned. He didn't clutter his mind with stuff he didn't have to remember. I like that approach and so I write down stuff I need to know but don't need to remember. And the stuff I might need to know in a hurry I carry with me.

Customers will try to slip things past you and claim that they were in the specification all along; but if you have a good project spec, signed by the customer…

Project staff will claim they didn't know they were supposed to do this or that; but if you have a good definition of tasks…

You must keep formal records to help the project run smoothly, both for the organisation and to preserve your own sanity. But you should keep them only to a level appropriate to the scale of the project. They need to be sufficiently detailed to enable someone else to take over the project should you fall under a bus on the way home tonight. And they should be sufficiently detailed to enable you to satisfy your funders and to use to justify your expertise when it comes to bidding for the next project.

Remember, despite all the regulation that has come our way in the last few years, paperwork is your *servant*, not your master. It needs to be reminded about that from time to time.

You must have a

- project brief (or project specification – there are lots of names for this document)
- project plan
- risk log/register
- issue log/register
- stakeholder log/register (not mandatory, but a really good idea)
- log book

It can be useful to have other stuff as well but I believe these six are the minimum for the project. With them you know what you have to do (project brief), how you are going to do it (and with whom, and when and where – the project plan), what you need to look out for (risk register) and what the potential problems are (issue log). The stakeholder log reminds you who is involved and their agenda and the log book is a notebook that you keep and use it to note down conversations, telephone calls, notes at meetings, etc. It will be a sort of project diary and will help you keep on top of everything.

As the size and complexity of the project increases, it helps to have more written down because there's only so much any project manager can keep in mind all the time. The number of different documents you have and the size of each document depends on the size and complexity of the project. There is no right or wrong answer.

Project management models

There are quite a number of models which are used as the basis of project management tools and techniques.

The one that I favour, and on which this book is based, is the six stage model. There's a diagram of the model later in the book.

> Six Stage Model
> - Define
> - Plan
> - Control
> - Review
> - Communication
> - Team Building
> - Handover/exit

OK – there are seven bullet points. At one time review and handover were a single stage, and then there would have been six bullet points. Over time these two have split into separate stages, but the name stuck. It's still a good model, whatever the name, and it gives you a structure on which to hang your processes and techniques. It gives you pointers to what you need to look for at particular stages of the project. It also reminds you of what's to come so you can be prepared.

Another model is the project life cycle. This model has essentially the same elements, they're just called something different and the emphasis is slightly different. The basics are the same.

> Project life cycle
> - Define
> - Plan
> - Implement
> - Close/hand over
> - Evaluate

And, of course, there's the PRINCE2 model. This has become the standard model for public sector project management and is rapidly extending its influence to the third sector. It is a very comprehensive model and can be successfully used for small and large projects. In this method, each project management process is specified with its key inputs and outputs and with specific goals and activities to be carried out. The techniques and processes in this book are compatible with PRINCE2.

Each project manager has his/her favourite. I like the six stage model, as I find it useful. It's up to you to find one with which you are comfortable and stick with it.

Using this book

This book presents defining and planning a project as a linear operation. In real life it is far from that. In order to define the project you need to do some planning, scheduling and budgeting. And when you've done that you might need to review the objectives, which means you have to go back to the planning again, and so on.

In order to make this book easier to read, the process is presented as a 'left-to-right' process. When you get to your first draft plan & budget, test it, try to pull it apart, and go through the cycle again. What you get the second time around will be a lot more robust and will be more likely to work.

There are some questions scattered throughout the book and some exercise blanks in the appendices. If it helps you can break from time to time and consider how the points in the book apply to your project(s). You can download blank exercise forms from 3rdsectorskills.com if you don't want to write in the book.

Thanks for downloading this sampler. The whole book is available in paperback or on Kindle, and you can get a copy from 3rdsectorskills.com.