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**Project Management**

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| This note provides an introduction to Project Management. Its aim is to highlight some of the key concepts and issues that should be considered when embarking on a project. It is not a manual on how to manage a project as projects vary significantly and whilst many of the core items are universal, the specific requirements of the project will need to be fully considered.Notwithstanding this, it should provide a simple overview of project management and a framework to assist discussions with your appointed project manager.Throughout the text there are links to the Association of Project Management, the chartered body for the profession, which provide more detailed information and links to further reading which you may find helpful. |

**What is a project?**

1. Projects are standalone tasks that deliver or facilitate change and have a beginning, a middle and an end. They should have a clear purpose and justification, an agreed budget and a defined governance structure. Projects can be of varying sizes but this guidance is targeted primarily at larger projects.

<https://www.apm.org.uk/resources/what-is-project-management/>

**What is Project Management?**

1. Project Management is a term used to describe a formal approach to managing and delivering a specific and often complex task. It provides a framework and ongoing review mechanism to ensure that those commissioning the task have fully considered its rationale and benefits and, as the task / project is implemented, are aware of its progress and cost. It also provides a means of establishing and identifying key targets, risks, roles and accountability.

<https://www.apm.org.uk/resources/what-is-project-management/>

**How is a project structured?**

1. A project needs its own governance structure to oversee its management. This structure will often take the form of a project board and a sponsor or senior reporting officer. The sponsor will often chair the project board and will usually act as a link between Chapter and that board. The sponsor plays a central role in the governance of the project and is tasked with ensuring that the project’s key business rationale remains at the forefront of the project.

*The Project Board*

1. The project board is accountable for the whole project. It provides the forum for decision making, reviewing risks and, with the sponsor, ensuring the project stays true to its core business case. It will usually represent financial and user interests and its members should oversee deployment and make decisions as the project develops.
2. The board will usually have Chapter and senior staff representation and, as well as representing key stakeholders, should comprise a mixture of skill sets. The formation of the Board can be assisted by the use of a skills audit.

*The Project Manager*

1. The project manager works with the sponsor and the project board and is tasked with delivering the project on time, within scope and budget. They are also responsible for leading and motivating the design team. To do so, the project manager must understand why the project is needed and its impact both in the short and longer term.
2. As part of their role, the project manager will identify project resources needed and assign tasks and responsibilities. They will prepare a plan for the project, monitor progress and cost, and identify changes in scope and risk. With the project sponsor they are responsible for ensuring that the project board is fully informed. Further information on project governance can be found here:

<https://www.apm.org.uk/resources/what-is-project-management/what-is-governance/>

**Managing the Project**

1. Projects should have a defined purpose, a plan showing timescales, dependencies and responsibilities, a budget, a risk register, a governance structure and a clear outline of requirements. Before implementing the project, it is recommended that there is a brief review stage to ensure that the project will deliver the desired benefits, has the support of stakeholders, has the correct governance and is financially sound with risks considered and where possible mitigated.

*Risk Assessment and Management*

1. Projects facilitate change and as such, there is an inherent uncertainty which brings risk. Risk Management seeks to identify those risks where the greatest vulnerabilities lie and where possible mitigate them. Key to this exercise is stakeholder engagement, due diligence and survey work. However, some unforeseen risks will almost certainly arise and a sensible contingency should form part of the project programme and budget. Further reading is available here:

<https://www.apm.org.uk/resources/what-is-project-management/what-is-risk-management/>

*Stakeholder Engagement*

1. Stakeholder engagement is key to the success of the project and should form part of the project’s outline and detailed design and evolution. Fundamentally, this engagement should gain stakeholder approval and support, provide an insight into possible risks and opportunities and enable successful planning. Stakeholder engagement spans many disciplines and has become an independent area of study. Further information can be found in the links below:

<https://www.apm.org.uk/resources/what-is-project-management/what-is-stakeholder-engagement/>

<https://www.apm.org.uk/media/6673/stakeholder_engagement_1st_edition_pgguidance_2014.pdf>

**Project lifecycle**

1. Given projects have a beginning, a middle and an end, they can be said to have a lifecycle. This lifecycle can be seen in a linear way, be iterative or a hybrid of the two. This note has assumed a traditional linear approach but this may be something that you would wish to discuss with your project manager. Further details on the project lifecycle can be found here:

<https://www.apm.org.uk/resources/what-is-project-management/what-is-a-life-cycle/>

*Traditional linear lifecycle*

1. Typically when adopting a linear approach a project will have 5 key stages:
2. The initial idea
3. Defining the project
4. Detailed Design
5. Implementing the project
6. Reviewing the project

A brief commentary on these stages is set out below:

*The Initial Idea*

1. This is the genesis of the project; the identification of the need for or the benefit of, undertaking the task. The initial idea can emerge from any department or even the congregation but before moving to the next stage should involve an initial cost benefit and risk reward analysis and internal discussion within the Senior Management Team.

*Defining the project*

1. Having determined that the initial idea is worth developing, an outline project scope or proposal should be prepared. This document should outline the project’s aims and benefits, alternative options if available, with pros and cons, stakeholders, likely resource implications, funding opportunities, a communications strategy, key risks and suggested governance arrangements. It should also include a recommendation as to the next step, ie. whether the project should move to detailed design and the implications of such, or be discarded. This outline proposal should be considered by Chapter.

*Detailed Design*

1. The detailed design builds on the outline proposal and is predicated on the project progressing. The design team and project governance arrangements are put in place, the scope of the project is fleshed out and assumptions within the outline proposal are reassessed and tested. An indicative timeline is produced reflecting funding opportunities, stakeholder engagement and other statutory consents. Reporting arrangements and control mechanisms are identified and agreed, the contractor is selected and the programme, budget and key milestones and decision points established. A project sponsor should be identified by the completion of this stage. This should be approved by Chapter.

*Implementing the project*

1. This phase of the project will focus on monitoring the work against programme and budget and responding to variations. The design team and the project manager will be in regular contact with the project sponsor (a member of Chapter or senior member of staff) who will be responsible for briefing Chapter on progress.

*Reviewing the project (Lessons learnt)*

1. This is the final stage of the project and should consider how the project progressed and whether any of the issues managed during the works could have been foreseen and mitigated in advance of the project’s implantation and if so, could this learning be applied in future projects.
2. Within this lifecycle there should be a number of review points to ensure that the project is continuing to meet the needs of the organisation and its continuance is aligned with its original business case.
3. The project’s business case should have been developed when defining the project and then honed during detailed design. It is essentially the project’s justification and rationale and should place the project in its strategic context and provide an economic rationale covering both returns expected and affordability. The review points within the lifecycle (sometimes known as decision gates) provide the project board with more mature estimates and information to ensure that the project continues to meet the organisation’s needs. Further reading on producing business case’s and their rationale can be found here:

<https://www.apm.org.uk/resources/what-is-project-management/what-is-a-business-case/>

Conclusion

1. This document is an overview and introduction to project management and should be seen as one of many tools that are available to Chapter to help ensure that projects are properly structured and resourced. A power point presentation has also been prepared which provides an overview of this guidance and some templates that may be useful.