

Basics of project management

(presentation workshop 2008)

What is a project? An example of ongoing work is the daily rescue work that many of you do. A project, in contrast, has a specific start date and end date. It must create a unique result or product.

It has a series of steps.

Project management is a rigorous process. You may wonder why it is necessary; why not choose the ad-hoc route and do things as they come along? It may seem simpler but will mostly result in problems such as unclear goals and poor use of time and money. In your case, many of you work with volunteers whose time is even more precious. So without strong project management, their time and energy may be poorly used. Project management will allow you to set more strategic goals for animals and achieve them.

We will go through, step-by-step, how to complete a project successfully. While that is very important, there are some key ingredients to successful projects and they are leadership, communication and teamwork.

Before we look at what to do, let's look at what not to do. The top 10 things that go wrong in a project are:

1. Unclear goals and objectives
2. Lack of alignment to project goals across stakeholders
3. Non-participative sponsors and stakeholders, or users
4. Poor communication of objectives and targets across the team
5. Unofficial scope creep (project gets bigger than planned)
6. Poor/ lack of measures or information on project performance
7. Unclear responsibilities across the project
8. Lack of / poor quality planning / resource planning
9. Lack of commitment or teamworking
10. Lack of ownership (relates to many areas)

Source: *Project Management Informed Solutions*

"The evidence received clearly and unanimously identified management factors and human, rather than technical issues as the prime causes of project failure"

- Study by Royal Academy of Engineering in 2004 in conjunction with the British Computer Society

Why do you think this is so?

- many individuals who take on the management of a project for the first time underestimate the task they are taking 'responsibility' for
- often people only assume the role of project manager on an occasional basis so by the time they manage their next project the scars of the last one (and the methods they were encouraged to employ) are long forgotten.
- People don't employ the fundamentals of project management

Planning a project

The time you spend on planning may seem long especially when you often feel like jumping right into the project. But a good plan will be a useful roadmap for you to get to your destination.

Sometimes you may become accidental project managers. You see a newspaper article on some cruelty to animals and decide to do something about it. So you just start doing things and managing the budget, time and problems as you go along. What kind of problems can you anticipate if you do this?

- Going for the wrong target and thus not really addressing the heart of the problem
- Running out of money to achieve the goal
- People taking on tasks they are not suitable for
- Communication problems
- Lack of professionalism
- A failed project!



You need to plan a project with those who have ideas, creativity, clear and analytical thinking. Consciously choose who in the team you select for various phases of the project. The critical first steps in a project to consider are stakeholders, scope, reasons for this project, clarification of goals and objectives, and feasibility.

1. Stakeholders - Stakeholders are those who are somehow affected by your project. They can be internal, such as the committee, and team members; or external, such as the donors, authorities, industry, etc. Questions to ask when considering external stakeholders:
 - Who will be affected by the project?
 - In what way?
 - What will they like or not like?
 - Are there any hidden agendas?

Stakeholders will need to be managed for your project to be successful. You must know who to engage in decision-making and keep lines of communication open. Also, make a case for why certain stakeholders benefit from supporting or working with your group.

2. Scope – this is what your project will cover, and what it will not cover because of strategic choice, constraints, restrictions or resource limitations. Be conscious of this throughout the project so your project doesn't end up doing more than planned.
3. The business case – why are you doing this project? You must be able to answer this question clearly.
4. Clarify goals and objectives - what difference do you want your project to make? Answering this question will give you your goals. Are your goals clear enough so that someone else understands them in the way you do? Show them to a team-member and find out their interpretation of it. Your objectives need to be
 - Specific
 - Measurable
 - Agreed upon - is there consensus on the goals among the decision-makers in the group and your donor?
 - Realistic - Sometimes volunteer groups come up with overly-ambitious goals that are not focused. You have limited resources. A small project well done is more valuable than an ambitious project poorly done.
 - Timely - projects without well-thought out deadlines will face many problems.

Know the Difference

- Goals are broad; objectives are narrow.
 - Goals are general intentions; objectives are precise.
 - Goals are intangible; objectives are tangible.
 - Goals are abstract; objectives are concrete.
5. Feasibility - It is not enough that you want to do a project. You must be ABLE to. Take these steps to find out if it is feasible for you to undertake the project.
 - Study goals and scope of project.
 - Do we have the right knowledge, skills, time, energy and money to do this?
 - Can we acquire these if we don't have them?
 - Can we handle any risks involved?

Risks must be handled. We need to think about the following:

- What could go wrong?
- What would cause it to go wrong?
- What can I do to stop it from going wrong?
- What will I do if it does go wrong?

One common problem in volunteer groups is that your volunteers are not trained in certain tasks. Let's take catching stray dogs as an example. What kind of problems might you face if you let untrained volunteers with no experience try and catch dogs?

If you have a stray dog neutering programme, you need to think through such details. You would need to think of how you can provide volunteers with training and education in catching dogs. And also, whether you have the right dog catching tools.

Thinking about problems from the start is not negative as some people may think. It's a way to proactively prevent things that may impact badly on your project later.



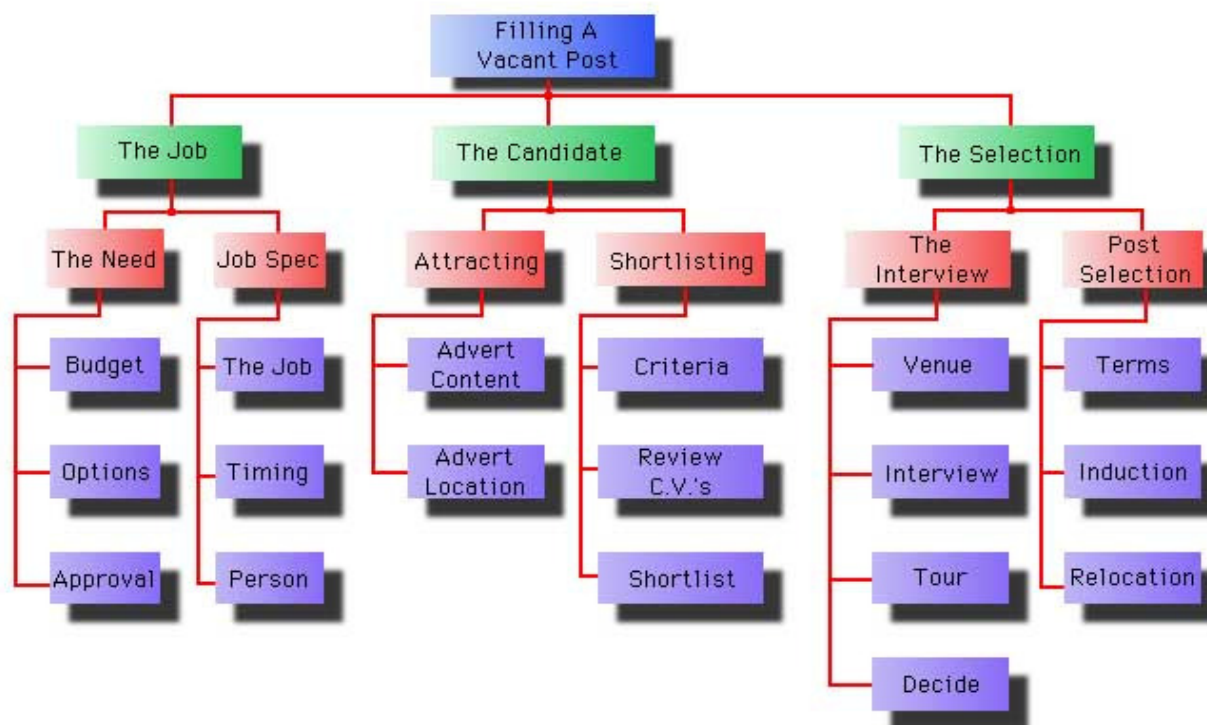
Work Breakdown

Projects are large endeavours. Sometimes they seem larger than life. So you need to break it down into manageable pieces. These become “tasks” that each person can do. Ask the following questions to break down work:

- What needs to get done? Be detailed.
- How can we organise the tasks so they make sense?
- Who is most suited to take on tasks?
- How much time will each task take?

This can be done during a planning meeting. Use a flipchart to map out and organise the points you come up with.

Below is the work breakdown structure, a visual way of organising the tasks you have thought of. This is an example that a company may use when recruiting new staff.



Source: <http://www.spottydog.u-net.com/>

Understanding the sequence of your work is important.

- Precedent - one action is dependent on another being completed. E.g. you can surf the internet only after you switch on the computer.
- Concurrent - more than one action can be done at the same time. E.g. you can surf the internet and listen to music at the same time.

Visual tools such as network diagrams help you see how tasks are connected to each other in your plan.

A project must have deliverables - any tangible outcome that is produced by the project. These can be documents, buildings, etc.

- Internal deliverables are produced as a consequence of executing the project, and are usually only needed by the project team
- External deliverables are those that are created for external stakeholders such as sponsors.

To summarise:

- Goal - what difference will this make? (Broad)
- Objectives - what specific measurable differences need to be made to achieve the goal? (Narrow)
- Tasks - what do we need to do to achieve the objectives? (Action)
- Deliverables - what concrete outcomes are needed to show that the tasks have been completed? (Results of action)



Scheduling

Most of us have dreams in our work for animals. But we need to use hard skills to do work that finally makes a difference. We need to be disciplined, for example, and start and complete work efficiently without letting it drag indefinitely.

What is a deadline?

- A deadline is a specific point in time at which a project or specific task must be completed.
- A deadline is also a promise to others such as donors and your team but also yourself.

A project will have different tasks with their own deadlines. If someone does not meet the deadline for their tasks, they may slow down the whole project. A project will also have a final deadline, which is when it is complete.

You need to estimate:

- What tasks need to be done?
- What resources do you have?
- How much time will each task take?

Don't underestimate the amount of time needed. Let's say you are doing interviews with vets and want to estimate time to do this. Say it takes 30 minutes to conduct an interview with one vet. But don't forget! It takes two days to identify vets to interview, 10 minutes to call and ask if vets want to take part in a survey and for each vet, maximum 120 minutes to travel to and fro, 30 minutes to do the interview, 80 minutes to document the interview.

Learning takes time. Don't expect that people will jump straight into tasks and start work immediately. This is for all kinds of people - whether staff or volunteers. People need time to learn what they have to do. If the tasks needed trained people and you need time to train, factor this in. Match the tasks with the right team members. Maximise their strengths.

Be realistic. When you schedule, factor in rest days, and extra time, as your volunteers have full-time jobs. Encourage your volunteers to give themselves enough personal time. For example, volunteers may not be able to work on your project for several consecutive days. If your volunteers are very tired, the quality of the project will be poor. Or they may suffer from burnout.

You should check that your estimates of time are correct. Importantly, those who are doing the work should provide estimates on effort.

If you need more guidance on how much to estimate for certain tasks, talk to others who have completed projects and have learnt from the experience.

Tools

- Master Calendar: All team members will use this to check for important deadlines, off-days, dates of meetings and status reports, etc. If you work online, get an online calendar that everyone can access.
- Gantt Chart



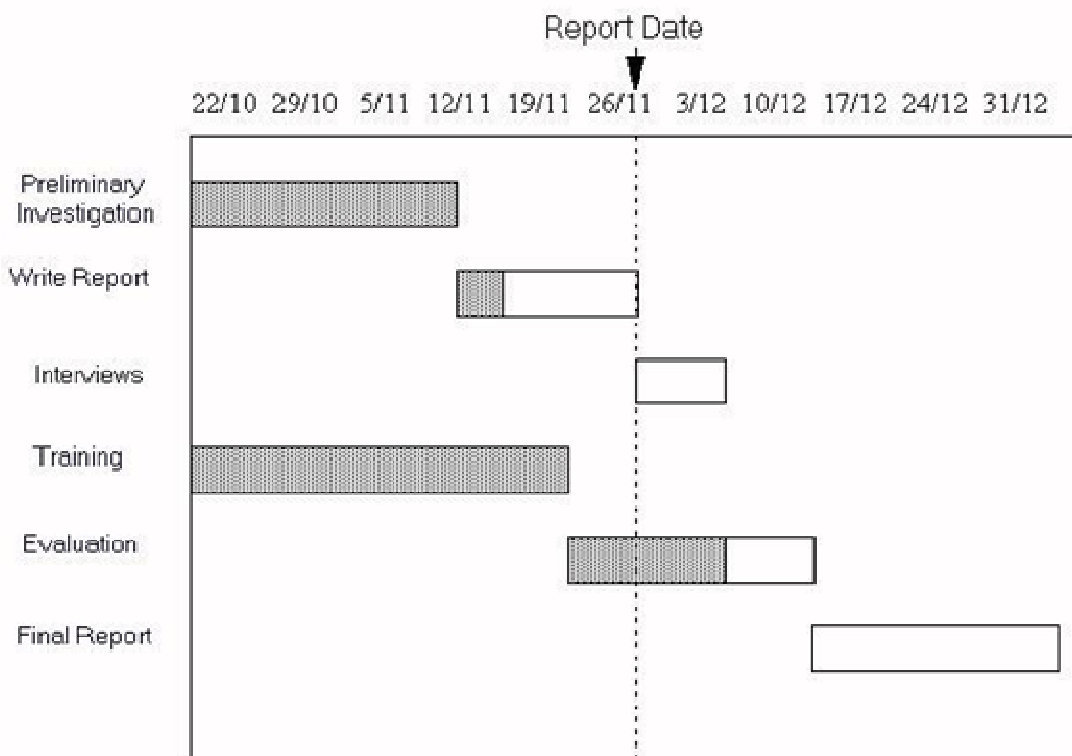


Figure 1: Gantt Chart

Source: searchsoftwarequality.com

The figure above is a Gantt chart, a simple visual tool to show the timing of tasks in a project.

1. In a Gantt chart, each task takes up one row.
2. Dates run along the top in increments of days, weeks or months, depending on the total length of the project. It's useful to mark important deadlines on it. Here you can see when the first version of the report is due - 26/11.
3. The expected time for each task is represented by a horizontal bar whose left end marks the expected beginning of the task and whose right end marks the expected completion date.
4. As the project progresses, the chart is updated by filling in the bars to a length proportional to the fraction of work that has been accomplished on the task.
5. Completed tasks lie to the left of the line and are completely filled in.
6. Current tasks cross the line and are behind schedule if their filled-in section is to the left of the line and ahead of schedule if the filled-in section stops to the right of the line.
7. Future tasks lie completely to the right of the line.

Budget

If you want things done faster, it will cost more. For example, you may need to hire a part-time helper if you are running an all-volunteer team. However, this should be thought of at the beginning, not when the project implementation has started.

- **Direct costs** are **costs** that can be identified specifically with a project and therefore are charged to that project. They include:
 - Labour for project
 - Supplies and materials
 - Equipment
 - Travel
 - Training
- **Indirect costs** are **costs** incurred for common or joint objectives and therefore cannot be readily and specifically identified with a particular project or activity. They include:
 - Facilities (electricity, etc)
 - Salary for staff who don't solely work on your project



Let's say your daily work is running a shelter. You then decide to do a project on animal welfare education and use the office space that is attached to your shelter to have project meetings, etc. What might some of your direct costs of the project be?

What many people would do is to skip the indirect costs when submitting a funding proposal. When you use the office space that was built for the shelter, you are using its electricity, phone, space, etc. You need to include partial costs for those in your project proposal. There are different methods to do this but we are not going to cover those in detail. For now, at a very basic level, you can work out your usage of the office in terms of hours, then use that to work out how much that would be in indirect costs.

Budgeting decisions:

- Top-down approach - decided by leadership
- Bottom-up approach - done in consultation with team
- Mixture

What approach you use depends on your leadership style, your own group, etc. Consulting with your core team to brainstorm what resources are needed for each task is often very helpful.

Estimating costs:

- Look at each task.
- What are all the components to it?
- What are all the possible resources you need from manpower to materials and transport to complete each task effectively?
- How much do they cost? (Don't forget to take into account volume where appropriate).

For example, if you are going to vaccinate dogs, indicate the cost to vaccinate each dog and indicate number of dogs you are aiming to neuter.

Estimating Expenses:

- Do proper research.
- Estimate carefully based on your experience.
- Ask others who have experience (internally or externally).

There will be things you can get precise figures for. This is easier for things you want to buy as you can check out the prices. If you cannot get specific figures for something such as transport, pick up a pen, sit down with a few team members who are detailed thinkers and jot down your estimates one by one.

What are you funding from your own pocket that you don't include in your budget?

Because you may be used to putting in your own money to pay for things, when you do have an opportunity to ask a donor for funding, you may forget to ask for certain things. These include transport, mobile phone communications, internet use. All these add up and it is important that you include these in your budget. If you are going to do this, you need to ask your volunteers to keep receipts/bills of expenditure and come up with a clear reimbursement protocol. Be careful not to drain yourself or your volunteers financially. 10 - 15% extra in budget often acts as a safety net.

Budget reminders:

- Budget can be hard to change once submitted to donors! Get it right from the start.
- Stick to the budget. Monitor expenditure at regular intervals.
- If possible, try and get someone with accounting experience to do book-keeping.
- Even if you do this, learn enough about budgeting to do checks.

You are responsible for how your group manages money.

Implementation

Starting the Project: Set the right tone from the start.

Can we work only through email? Even if you use mainly email to communicate for your normal operations, make sure you meet for projects. Projects will require people to work as a team, stick to a budget and deadlines, resolve problems together, learn and grow together. It's usually harder if people don't meet to feel that they are working as a team. Even as a volunteer group leader, you need to use a wise mixture of meetings, phone calls and emails. Some problems and conflicts will also need to be resolved face to face.



Meetings:

People often groan when they hear that they have to attend a meeting. If your team feels like that, it means you need to improve the way in which you use and run meetings.

Good meetings:

- Start and end on time
- Have a written agenda and follow it
- Encourage people to speak openly
- Have minutes that record actions to be taken, who is responsible for them and when they are to be completed.
- Have minutes that are distributed - Two days after meeting (ideally)

Remember

- Respect people's time. Be focused and efficient.
- Make sure meetings are valuable.
- People listen to your tone. If you sound enthusiastic, you transmit that. If you sound tired, you transmit that too.

Kick-off meeting:

- Communicate goals and objectives
- Gain commitment and enthusiasm
- Clarify critical deadlines and phases
- Overall schedule and work plan for team members
- Clarify communication tools such as email lists you may use

If you use an email list like yahoo-groups to communicate, use a separate one for the Project. This will help to keep the project separate from your daily work.

First Project Meeting:

- Introduce members and roles
- Priorities
- Go through tools everyone will be using. Demonstrate how to use them. Example: Master Calendar, Gantt Chart

Knowing that most of you run volunteer groups, you may have very limited time so you could do these during the kick-off meeting.

Everyone should have in writing:

- Goals and objectives
- Their own role and tasks and deadlines
- A list of other team members' roles and contact details
- Administrative requirements such as status reports and how frequently they are needed

They should also know what to do in case there are problems and conflicts.

One week after the project has started, have individual meetings. The one week gives people time to reflect on what work has been assigned to them and discuss any teething problems, etc.:

- Point out what you notice as the person's strengths to explain why s/he was selected for specific tasks.
- Clarify priorities, role, tasks, schedule.
- Discuss how this person's work is connected to other work in the project and is integral to the project's success.
- Mention the resources the person has access to and constraints the person is working under.
- Invite questions, concerns, etc.
- Both take notes.

Operating Guidelines

Many people don't like paperwork like writing reports. But reporting is vital in project management. Please convey this understanding to your team.

You are beginning to see how much work is involved in managing a project well. There is a lot of information. This needs to be recorded in writing so that you can remember and monitor what is happening. Things in writing are easier to assess, synthesise and analyse.



Key Operational Documents

- Status Reports from team members
 - Purpose - To help you track progress, changes from plans and problems.
 - Regular intervals - the interval depends on the duration of your project. It is usually weekly or fortnightly. Use your best judgment. But don't have intervals that are too long (e.g. a month) or you may face problems that have backed up.
 - Everyone uses same format - provide your team members with a format for their status reports so it's easy for you to analyse all of them.
- Progress Reports from you to team - These reports synthesis status reports from team members.
 - Purpose - To help team know how project is doing, be reminded of important issues or dates. You can also add a motivational aspect to it.
 - Short, succinct and useful to team
 - Regular intervals
- Progress Reports to donors/partners
 - Meet reporting requirements if any
 - Sometimes you can discuss with donor and find out what they prefer and what is manageable for you to put together
 - More formal, less detailed
- Project Diary
 - Tracks progress from your perspective as leader
 - If problems crop up, you would have record of details
 - Can be used to explain changes to plan

Keep all documents well organised and filed and stored electronically. It will make your job easier!

Monitoring and Control

If you don't monitor your project frequently enough, small deviations from the project plan may grow large till you face a lot of difficulty in trying to get the project back on track. For example, one team member may be making a mistake. If you don't know about it she may continue making the mistake and wasting her time and energy on it. This will slow down the project.

One common mistake that is made, is to monitor a lot in the beginning, then stop. Many leaders end up with severe problems when they do this.

What to Monitor

- Is the project meeting goals?
- Is it on time?
- Is it within budget?
- Is there teamwork?
- Is the motivation level healthy?
- Is there any potential problem cropping up?

To help you to monitor your project, use:

- Project Plan
- Gantt charts
- Status reports
- Project review meetings - after milestone or before or after key phase of project

Act as your Monitor

- If there are problems, address them promptly.
- Make any necessary revisions to the project plan.

Managing change

Just because you need to stay on course and reach your target doesn't mean you don't need to learn to manage change. The map to reach your target may have to change.

If you think you got the perfect plan and have worked out the time and budget and assigned people their tasks and expect everything to go as planned...you're in for a surprise. Expect it!

Expect changes you may need to make to your plan. Know its impact on schedule, cost or outcome.

Ask yourself what the change means. How does it affect other team members' work? If something turned out to be more expensive than predicted but must be purchased, can you cut costs in other items to keep to the budget?



Usually, goals and objectives should remain intact. If you thought through your goals and objectives carefully, most frequently, you should not have to change these through the course of the project. Try to stick to budget closely. Some sponsors will not be able to or want to increase your funding once the budget is approved. This points to the importance of getting realistic estimates and monitoring expenditure carefully.

Have a system of approving changes. Be clear about who can approve changes. If it is you, how should changes be brought to your attention? Will a simple email be sufficient for some things and more formal forms be needed for bigger changes?

Changes should be communicated to team members. Bigger changes should be communicated to external partners and sponsors. Don't surprise sponsors. Be flexible, creative and resourceful to deal with changes.

Closing the Project

- Check if team agrees that project has met goals. Discuss with sponsor too.
- Give final version of deliverables (report/film, etc) to relevant parties.
- Release team - if you're working with all volunteers, take a break before moving on to the next project.
- Release equipment - if the project required use of some equipment, ensure that it is freed up for use by the organisation for other needs.
- Close accounts - check that all numbers add up, all invoices have been paid, etc.

Evaluation

What is Evaluation?

An appraisal of the progress and performance of a job compared to what was originally planned.

- Lewis, J. P. "Project Planning, Scheduling & Control"

If you don't learning from experience, you'll repeat the same mistakes again and again. Be honest. Evaluation is not about glossing over the mistakes and just saying you did a good job. It needs rigorous honesty to be effective.

Did you meet your goals? This is most important. Don't confuse busy-ness with results-focused action. You may have been busy for three months on the project but not met your goal!

How do you know? Check your achievements against your original goals and objectives.

Evaluating and documenting

- Team Meeting
 - Acknowledge contributions.
 - Did we meet goals and objectives?
 - What went well?
 - Where did we face problems? How did we address these?
 - Did we keep to schedule and budget?
 - What was the quality of the project?
 - What changes were made to the plan and how did they impact the project?
 - Learning points and recommendations
- Individual meeting with team members
 - Acknowledge achievements and how person handled work.
 - Provide useful feedback. You are developing your volunteers.
 - Invite frank feedback on your leadership.
 - If you don't have time, make a phone call.
- Post-implementation review six months later
 - What happened to the project? What impact did it have? How do you know?
 - What went well?
 - What could have been better?
 - What are the learning points?
- Evaluation report

After 6 months, you would have emotional distance from the project and would have had the chance to see what impact, if any, it has had. Sometimes you can speak to relevant parties to check on how the project has changed things.

In a volunteer group it is important for the group to have found the work rewarding.

With a thorough and honest evaluation, you will do better on your next project.



Software

Before we wrap up the project development life cycle, a word about software - for those of you who are inclined, there is project management software such as Microsoft Office Project. They have templates you can use. But remember: Don't hide behind software or have a false sense of security because you are using it. It is not a replacement for clear thinking, communication, teamwork and practising leadership.

Project Plan

- Many of the concepts we have looked at thus far contribute to the project plan.
- Team and relevant stakeholders will receive project plan.
- It is the thinking that goes behind the plan that is important.
- Keep the plan alive - revise it when necessary. Ensure team always has a copy of latest version.

The Team

"The way a team plays as a whole determines its success. You may have the greatest bunch of individual stars in the world, but if they don't play together, the club won't be worth a dime."

- Babe Ruth, American Baseball legend

Choosing Team Members:

- Who has the right knowledge and skills or is able and willing to learn quickly?
- Who has the time?
- Who is reliable? (on time, good work)
- Who works well in a team?

Select your team members with careful thought:

- Who has good ideas and clear thinking? Use them during Planning.
- Who is reliable in doing specific tasks? Use them during Implementation
- Who can work closely with you? Use her/him as a deputy (if possible).

And if working solely with volunteers, do you need to hire any personnel for any specific task your team does not have the expertise for?

Build a Strong Team:

- Invite team members to contribute towards key decisions
- Ensure they know the 'bigger picture', and don't operate in isolation. Help them see how one person's work affects others' and the whole project.
- Keep them informed of *why* decisions are made, not just what they are
- Encourage them to highlight risks and issues and solve problems together.
- Encourage them to support and respect each other
- Encourage them to communicate open and honestly despite the level of challenge or issue.
- Encourage use of common tools (like online calendar) for communicating progress to team.

Adapted from: Project Management Informed Solutions website

Communication

Communication is the lifeblood of projects.

- *Project Management Informed Solutions*

Provide timely and reliable information. Remember to use the appropriate kind of communication either through meetings or emailed reports and keep the team and donors informed of the project status. Ask insightful questions. This is the best way to dig deeper into an issue and fully understand it before taking action.

There are many forms of communication, but the most important, and sometimes the least practiced, is *listening*.

- *Project Managed Informed Solutions*



"To say that a person feels listened to means a lot more than just their ideas get heard. It's a sign of respect. It makes people feel valued."

- Deborah Tannen, Author and Professor of Linguistics, Georgetown University

Providing genuine feedback throughout the project is important:

- Frequent and timely soon after action
- Specific and accurate. Don't say "Good job". Say what was good about it.
- Behaviour, Evidence, Impact.
- Don't shy from giving critical feedback just because you work with volunteers. This kind of thinking will jeopardise your project quality. Speak the truth with kindness and diplomacy.

Appreciate, appreciate, appreciate.

Everyone yearns to be appreciated for good work. When you give feedback, don't forget to appreciate actions you value. Remember that most of you work with volunteers who are giving up their spare time; ensure that they feel valued. Don't forget external stakeholders. Provide donors, sponsors and partners with clear information.

Leadership

Leadership doesn't come with your title. It is earned by your actions.

- Ensure project and daily work don't get lost in each other.
- Communicate well.
- Delegate but know when to help. As a leader, you need to know which task to assign to whom and gain commitment. You need to monitor and track progress using the right tools. But you also need to know when to roll up your sleeves and help the team. Is there someone who needs help? Is there a task that is inherently difficult or time-consuming? Where can your personal strengths best be used?
- Be available. The team members will ask you questions, bring conflicts for you resolve, etc. Be there for them.
- Solve problems and make decisions with integrity and efficiency.
- Be known as a fair leader, someone who can be trusted. Do what you say. You will earn credibility and respect and be a role model for your team when your words can be trusted.

Critical Skills

- Volunteer management
- Managing meetings
- Facilitating groups
- Solving problems
- Decision-making
- Managing conflict

These skills are also very important when managing projects. We encourage you to put aside some time reading up on them. The time to learn is not when you have a project but way before so that you are well prepared for it. A project's success depends highly on good leadership. Leadership is hard work, especially in volunteer groups. Remember to practise self-care and pace yourself.

Projects by volunteers: Special Note

Remember

- Project management principles remain the same
- Be very realistic about goals and schedule
- If volunteers need training or time to learn a task, factor that in.
- Even if you use your own money, create and stick to a budget. Record expenses.
- Provide useful feedback.
- Appreciate.
- Be professional.
- Encourage self-care. Prevent burnout.

