Stating the obvious? A project management method which works

This handout summarises in key point form, for a 10 minute presentation, the project management method used in the multi-partner Union Education Online (UEO).

Half a dozen characteristics of multi-partner JISC development projects like UEO

1. Changing personnel, for whom the project is usually a variable, and often minor, part of their and their organisation's work
2. Diverse range of partners, spread geographically.
3. ICT fluent (efluent!) personnel.
4. Effort funded at marginal or semi-marginal costs, therefore difficult/unwise to try to contractualize it too much.
5. Part of a bigger programme with programme-wide evaluation, a programme manager, a defined set of reporting requirements, but no proper "client".
6. Goals which need to be altered as the project progresses.

A dozen things to do

1. Define some roles, in particular, Project Director (who must be active rather than "titular"), and Project Manager.
2. Have a three-weekly, minuted, 1-hour max, telephone conference open to all the individuals involved in the project, chaired by the Project Director, "clerked" by the Project Manager. Issue an Agenda in advance. In UEO we call this the Project Implementation Group or PIG.
3. Give all action points a sequential number and a date, and put a name against them, and if more than one name, a lead person's name, and (usually) a completion deadline. This concentrates the minds of those responsible for them, especially when they become overdue.
4. Use occasional face-to-face meetings when face-to-face contact is essential for the creative processes of the project. But do not waste travel and budget and meeting time for the routine process of keeping a project on track.
5. Have a non-public project Jiscmail list. Include the JISC Programme Manager and the JISC Programme Evaluators on it, as well as all members of the PIG. Use it for the overwhelming majority of project communications, including one-to-one communications. (Put the names of the people to whom a communication is directed in brackets in the subject line.)
6. Use the Jiscmail list's file store for key project documents rather than sending them as email attachments. The file-store is a neutral place and has none of the idiosyncrasies of an institution's system.
7. Except for subcontractors who are doing defined things for a defined amount of money, have a simple enabling Partnership Agreement, rather than wasting time and money on a formal legal agreement, which may not be finished until close to the project's completion date. This sets the early tone for the project and translates the senior level commitment from the bid into the project itself.[1]
8. Produce a proper Project Initiation Document, agreed with JISC at the start of the project which sets out how you will do the project, and includes things like the Partnership Agreement, the budget, a Gantt chart, and a list of deliverables.
9. Once the project is underway, rename the Project Initiation Document a Project *Implementation* Document (PID). Revise this in accordance with the JISC reporting requirements (i.e. biannually in the case of UEO), including the Gantt chant chart, and the list of deliverables.
10. Control "drift". It is much better, to change the project goals by proper steered decision as the project progresses than just letting things drift.
11. Use the PID as a main component of your reports to JISC. It provides a "one-stop" overview all the salient features of the project. It fits your internal needs rather than being constrained by the requirements of a JISC template.
12. Distribute budget from the lead institution regularly, on the basis of claims from partner organisations, signed off by the Project Manager, but acted upon by the lead institution.

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[1] Some reservations about this approach have been expressed by people with a strong eye on intellectual property issues.