Stating the obvious? A project management method which works

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

Half a dozen characteristics of typical multi-partner projects

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. Effort possibly funded at marginal or semi-marginal costs, therefore difficult/unwise to try to contractualize it too much.

4. Project often part of a bigger programme with programme-wide evaluation, a programme manager, a defined set of reporting requirements, but no proper "client".

5. Goals which need to be altered as the project progresses.

6. Most staff in the project have "day jobs".

A baker's dozen things to do (and to summarise into your bid)

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. Call it, say, 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 email list. In JISC projects 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 some kind of file store (such as is provided by Jiscmail) 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, avoiding if you can having 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]

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

8. Produce a proper Project Initiation Document, agreed with the client at the start of the project and probably drawing heavily on the bid document, which sets out how you will do the project, and includes things like the Partnership Agreement, a list of project personnel, the budget, a Gantt chart, a list of deliverables, and a risk register.

9. Once the project is underway, rename the Project Initiation Document a Project *Implementation* Document (PID). Revise this in accordance with the client's reporting requirements, including the Gantt chant chart, the list of deliverables, and the risk register.

10. Use the PID as a main component of your reports to the client. It provides a "one-stop" overview all the salient features of the project.

11. Control "drift". It is much better, to change the project goals by proper steered decision as the project progresses than through just letting things drift.

12. Distribute budget from the lead institution regularly. Do not rule out doing this on the basis of *claims* from partner organisations, signed off by the Project Manager, so that you retain leverage over the partner organisation.

13. Consider providing the client with a short fortnightly or monthly "Highlight Report" to a set heading structure, such as:

- Work in progress;
- Tasks/milestones complete;
- Issues, risks and countermeasures;
- Main actions in the next 4 weeks.