



## Arts Marketing in Derbyshire Programme

# An introduction to *Project Management*



**Cultural Consortium**

# Project Management

## Introduction

Project management is a useful tool in giving a structured approach to tasks in order to successfully achieve the goals that have been set. There are a number of project management systems that have been developed for a variety of specialist areas but this course will introduce a basic system that can be used in a variety of situations common to arts organisations. The course will not deal with project concept and start up but will concentrate on the process once a project has been identified.

Firstly, a few definitions we will be using during the course.

**Project** – a time limited programme to achieve specific objectives.

**Project management** – the use of resources in a structured way to deliver the strategic objectives of an organisation within defined constraints.

**Programme** – a collection of interdependent projects managed in a coordinated way.

Project management is not an add-on to your normal working process or a magic wand to achieve the unrealistic.

## Roles and responsibilities

The project manager has a distinct role but equally important in the process is to identify some of the key stakeholders and look at the project hierarchy in terms of the other roles.

**Project steering group** – may be a board, committee, funders or more likely a combination of stakeholders. They may often be the final decision makers within the project so need to be informed of progress and more importantly, of problems. The project manager should make reporting to this group a key element of the process. Often this group will also be responsible for appointing the project manager as well.

The key responsibilities for the steering group are:

- Approving the aims and objectives of the project
- Oversight of the project process, procedures, budget and control
- Maintaining support and commitment for the project
- Approving plans, changes and reports and reacting promptly to issues requiring decisions
- Appointing project manager

**Project manager** – will be accountable to the project steering group on a day to day basis for the delivery of the project.

The key responsibilities for the project manager are:

- Liaison with the steering group
- Selecting and managing the project team
- Defining, planning, and delivering the project including
  - Securing resources
  - Monitoring progress
  - Risk assessment
  - Budgetary control
  - Legal compliance
- Completion and evaluation

**Project team** – consisting of **core** and **extended** team members who will be accountable for specific packages of the project and who may have delegated authority for the delivery of particular parts of the project from the project manager.

The project team will assist the project manager in fulfilling their responsibilities. If there are specific delegated responsibilities this needs to be formally agreed and the nature of delegation worked out.

## **Project preliminaries**

Before commencing planning a project it is useful to conduct some research to check on the viability of the project.

The major areas that need to be explored in order to establish the viability of the project are the constraints that might exist which will cause problems in the overall plan and even more crucially the assumptions that are made about the project without testing their validity.

Constraints can exist within a number of areas but are most commonly associated with the following:

**Budget** – including the cost of the project over time if it will be for any length of time

**Time** – both the length of the project and any critical time scale

**Quality** – within the process and the final product

Assumptions are often the most difficult to resolve as they are frequently not recognised as in need of testing. All assumptions need to be tested and the process is aided by using a team approach either with the steering group or project team before anything is built into the project plan.

There are a number of key questions that should be addressed at this stage:

### **Background – the devils advocate**

Why is the project necessary

What issues are being addressed and have they been adequately researched

Has there been any attempt to address them before

Where is the project being driven from and how robust is their information and/or research

What assumptions have been made

### **Context – who's agenda**

Is it clearly part of an agreed strategy

Is it linked to other projects/programmes

What's the timeframe

Who benefits

**Approach – am I in a corner**

Have the project needs and requirements been identified

Are the solutions predetermined

Is there a best/least worst option and can it be re-examined

Are there any specialist skills needed

**Objectives – what's actually wanted**

Are the deliverables known and are they clearly specified

Are the benefits quantified

Is the budget set

**Constraints – will anything hit the fan**

The possible constraints indicated above need to be explored

One of the most important lessons is that it is vital to record all information from the start of every project. Whether using a project notebook or computer, a project manager needs to have all information regarding the project recorded and properly filed. This should not only relate to documents, letters or emails but also to telephone calls and conversations.

## **Project definition**

One of the key elements in project planning is defining the elements of the project. This is important because this is where any elements that might be unclear, confused or even controversial can be researched and written in a way that will give confidence to stakeholders and the project team. The main elements in project definition consist of:

### **Project brief-** which would include:

History

Rationale

Benefits

Budget

Time scale

### **Organisation chart**

This should give an indication of the relationship between the stakeholders and clients as well as the project resources

### **Requirement brief**

Needs and expectations

Constraints and assumptions

### **Objectives**

Purpose

Overall objectives

Deliverables

Strategic links

**Scope of work** – this will be the technical aspects of the project and will include:

Legislative constraints

Specifications

Procedures and protocols

**Risk assessment** - this will be dealt with in detail later but the main areas of concern are:

The project in relation to the main business

The project

Processes and procedures within the project

The project definition work would be using **SMART** principles

**S**pecific

**M**easurable

**A**chievable

**R**ealistic

**T**ime limited

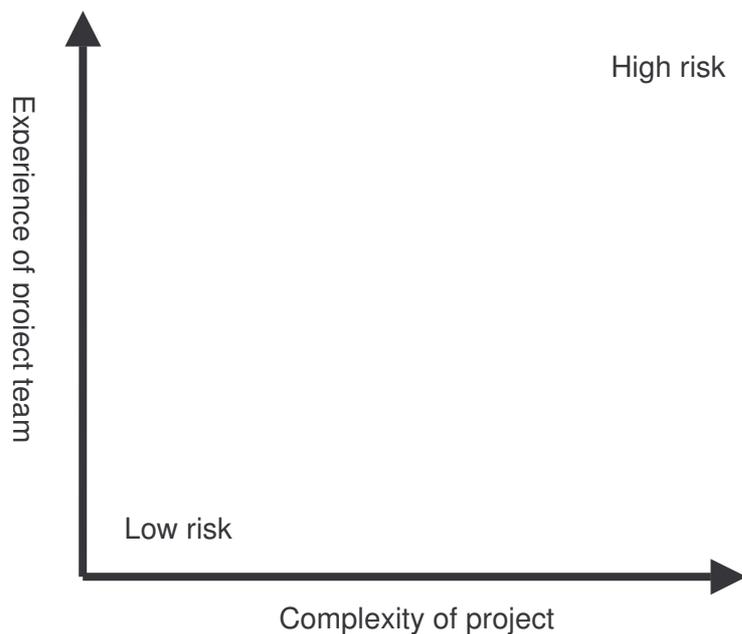
The defined project would also need to be approved through the formal procedures adopted by the steering group.

## Risk Analysis

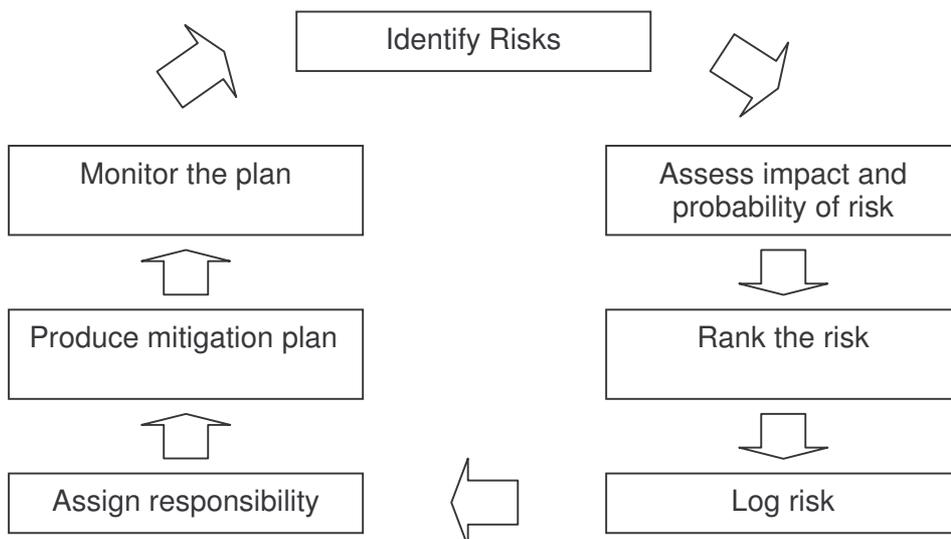
Risk analysis forms an important part of most project planning, especially if applying to funding bodies for significant amounts or for high profile projects. At all stages of a project it is essential to have risk management workshops with the project team in order to assess the risks and their potential impacts throughout the process.

Risks are generated both by the project itself and the project team through inexperience or its high complexity or by outside risks that may occur due to external forces, acts of god or other external occurrences. The task of the project manager is to understand the constraints inherent in the project and assembled team while being aware of potential external factors beyond the immediate control of the team.

An initial analysis of the project team and the project complexity should give a guide to the potential for problems occurring during the project.



The next phase is to begin to identify risks through meetings of the whole team responsible for the project.



Ranking the risks should follow a suitable scale that is clearly understood by all parties.

- Rank the probability of the risk occurring on a scale of 1 to 9 – where 1 means it is unlikely to happen and 9 a significant probability it will occur.
- Rank the impact of the risk on the project as low to high or other suitable wording.

Once this exercise has taken place the risk can be assessed. The level of risk should also be identified on a suitable scale, an example of which may be:

- **Low risk** – will have little impact on the project but requires monitoring
- **Medium risk** – will have a serious impact on an operational level requiring remedial action but will not jeopardise the project or milestones.
- **High risk** – will have a major impact on the project requiring significant action and the potential for radically altering the project outcomes or progress.
- **Unacceptable risk** – the project should not proceed without alternative strategies to reduce the risk.

Normally the results of the risk assessment are produced as a risk matrix.

		<i>Impact on Project</i>		
		<b>Low</b>	<b>Medium</b>	<b>High</b>
<i>Probability of risk occurring</i>	<b>High</b>	Medium risk	High risk	Unacceptable risk
	<b>Medium</b>	Low risk	High risk	Unacceptable risk
	<b>Low</b>	Low risk	Medium risk	High risk

The risk matrix should be reviewed periodically throughout the project and the matrix should be confirmed or modified as necessary.

## Project planning

The project planning process is what many think is the essence of project management but in reality it is where all the elements previously described come together. The aim of the planning process is to put some order and logic into the information gathered from the various sources and give a framework that allows the project to proceed smoothly.

The process is inevitably a series of questions about the project that need to have answers.

- What needs to be done
- When will it be done
- Who will do them
- What resources are needed to do it
- What is not going to be done

The purpose of these questions is to convert the information into a time based action plan in a suitable form for all of the partners in the project to understand and use as the master plan for the project. When the plan has been completed it should enable the project to:

- Identify everything that needs to be done
- Reduce risks to an acceptable level
- Provide a structured base for the project
- Establish procedures and develop the most effective and efficient method of completing the project.

The plan should not just be seen as a graphical representation of the activities within the project time scale but it needs to take account of all of the internal and external influences such as resource implications and relying on outside decision making processes.

Here are some key definitions we will use to define the project plan:

- **Task** – a small piece of work with clearly defined limits and outcomes (*that may be carried out by one person*)
- **Activity** – a number of tasks that completes a defined section of the project (*that may be carried out by several people*)
- **Key stage** – a collection of activities making a defined output probably linked to a milestone
- **Concurrent activities** – activities related to the project that are able to be undertaken in parallel

- **Series activities** – activities that are designed to be undertaken after one another or that need completion before another activity can begin
- **Duration** – real time working time on the project.
- **Milestone** – a key pat of the project where progress can be determined and measured

The first process is to identify the key stages of the programme and this is most often done as a top down process however it is also possible to undertake it as bottom up process as well.

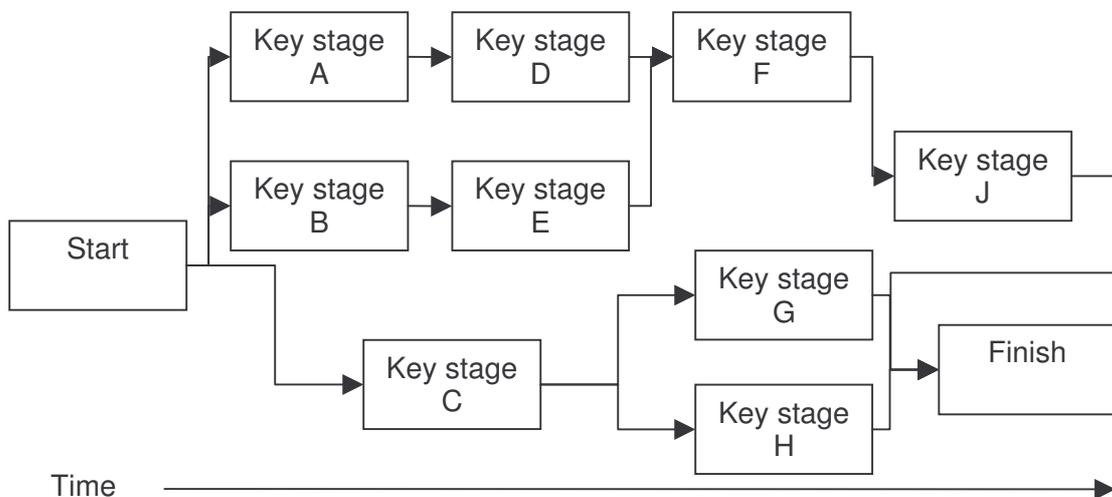
The top down process requires listing all of the project outcomes as a series of key stages. The bottom up process relies on identifying all of the tasks required to complete the project and grouped into a series of key stages. This is only a useful method when the project manager is experienced on similar projects to the one being undertaken.

The list of deliverables, as determined during the project definition phase, will become the initial list of key stages, which must comply to the SMART principles previously described.

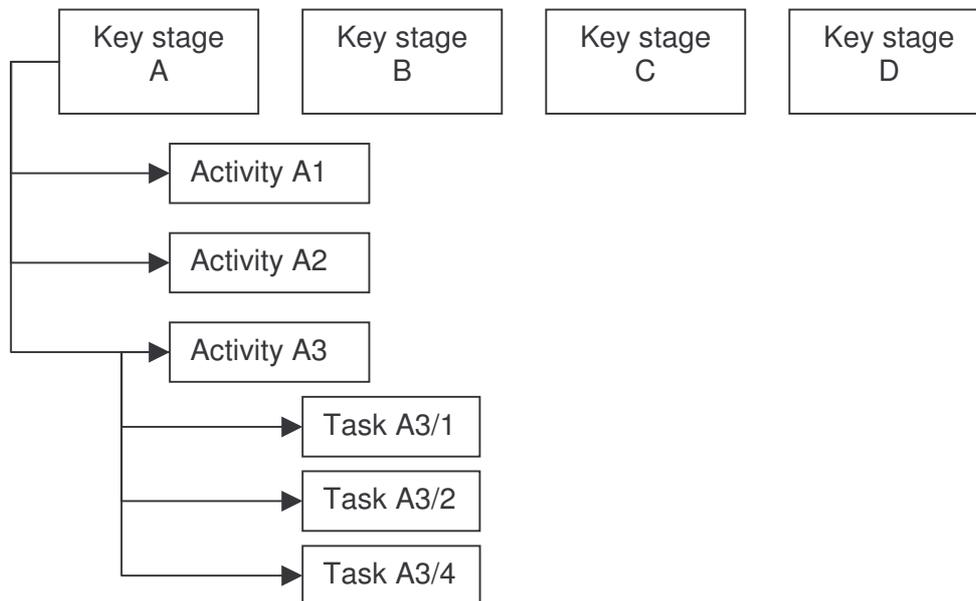
The next task is to organise the key stages into a logical sequence. During this part of the process, it is important not to be concerned with time and resources as this may skew the most logical approach. This can be undertaken in a number of ways but the most useful method is to write down the key stages on to paper and then move the pieces around until the process is complete. The questions that need to be asked in this process are:

- What needs to be completed before another key stage can begin
- What can happen at the same time

The diagram should give an indication of time flowing from one side of the sheet to another but not have a fixed time scale.



The next task is to then further break down the key stages into activities and tasks. Once again, the best methods of doing this is through an easily modified diagrammatic scheme such as Post it notes, white board or for the IT literate, a drawing software package.



The above breakdown does not indicate how the various parts of the project are dependent on each other, just the breakdown of each part of the project into tasks.

At this stage it is also appropriate to start allocating responsibility for each of the key stages, activities and tasks. Before allocating responsibilities can be completed, however, the estimation of time for the project also needs to be established. This must take account of the available working and non working days, holidays and other periods when work is not possible, such as performance times in a theatre. The duration must take account of some key elements:

- The experience of the team
- Outside influences such as application processing time or statutory periods for objections
- Non working time such as illness, training or falling under the double decker bus

**It has been shown that most projects underestimate the time needed by at least 30% due to poor research on potential constraints and not knowing the true working environment.**