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ITP: project management presentation documentation

In this package please find:
- *Project management in the cultural sector: a guide to principles, processes and performance* PowerPoint
- Presentation recording (audio and visual) 08.10.2020
- Zoom Chat function questions and answers
- Skeleton project management checklist
- Web links to project management hints and tips

Q&A

If the project fails do I have to start over with the same programme? Or change the programme? Either the project manager has to change or the budget has to change. Please guide me.

Day to day control over a project should be maintained by
- Authorising work to be done
- Monitoring progress including signing off completed work
- Reviewing the situation e.g. quality of products and services provided
- Reporting highlights
- Watching for, assessing and dealing with issues and risks
- Taking any corrective action

If you start to notice that the work being produced is not within the scope or to the quality required in order for project benefits to be realised, then you should
- Examine what the 'deviation' is
- Examine the extent of the 'deviation'
- Examine the impact of the deviation on your project's plan
- Determine the options for recovery and assess them against the project's business case
- Assess the impact of the options for recovery against the project plan – are individuals skilled and do they have the time to realise the recovery plan?
- Propose how you will ensure that the project will recover with a changed course of action in order to deliver the benefits of the project and the vision of the project

If you the deviations to your project mean that you cannot take corrective action and resume the current project, the project should be closed so that no further resources (time and money) is spent of the project.

Before deciding whether to attempt to start another project in order to realise the benefits of the original project you should evaluate and consider the lessons learnt from the first attempt. Evaluation includes speaking with project stakeholders at all levels to understand what worked and what could be improved. Evaluation feedback and lessons learnt should be applied to all future projects.

What can we do if the funders point of view for the final product is different from the project team vision?

My assumptions for the context of this question are:
- the project has started

- the difference in the vision has occurred during the project
- the difference is something that the funder might not be happy with

I would do the following:

- Go back to the project mandate / the project trigger / the original understanding of what the project was meant to deliver. Which party has altered their point of view / vision? Let this guide the conversations you have with your funder. Is the project trying to convince the funder that a changed vision will benefit the product? Or is the project trying to convince the funder that their vision does not align with the project's original understanding of what the product should do?
- Think really carefully about how the visions could still align, if you take away the detail are there still basic overriding ways that the visions continue to align? If yes, promote these to demonstrate that the funders vision remains important to your project.
- Are there other components to the project where the funder and project visions still align?
- Can you incorporate other products, activities or services into your project that advocate the vision of the funder, in lieu of the changed vision of the final product?
- Have a very clear understanding of why the difference in vision has occurred – what was the turning point? Why was this turning so significant that the project was forced to change it's vision from that of the funders? Explain this to the funder.
- How can you convince your funders that the project can still realise the original benefits even though the vision has changed?

My feeling is that your product should align with the vision of the funders to an extent, and it will be your job to ensure a middle ground is found that all parties accept.

The standardised handover document - is that very tailored to touring exhibitions, or is that something where you could share the template with us all and we'd all be able to use it? Because that sounds like a really good idea.

Handover document pointers – to be tailored to your project's need

1. Date the document to the last day you updated it

2. Highlight important dates and deadlines for the project – 'milestone dates' at the top of the document and classify them as confirmed dates or proposed dates

3. Include a list of all the people who have worked on the project in chronological order in order to capture where information may have been lost during a projects life (where there has been staff turnover) and how long other team members have been working on the project (if someone has worked on the project since project inception they may remember things even if not within their role and responsibilities).
   Identify the roles team members have officially and add in information about how the relationship works in reality e.g. Dr X is officially the curator and should be cc'd into all correspondence but is very busy and so Ms Y is your main point of contact for providing you with curatorial advice.

4. Include hyperlinks to saved email correspondence where the narrative behind a decision made is captured – email correspondence provides new starter with the complexity

behind a decision making process and the number of people involved in the decision-making process, and avoids new starter changing what has already been decided.

5. Where some actions will be important for the new person to complete ASAP add a note to this effect in the document e.g. ACTION ASAP. This will go some way to keeping a project on it's critical path and encouraging new starter to continue where the project has left off, as opposed to changing too much too soon.

6. Include the names, activities and contact details of suppliers. Include your last correspondence with the supplier so that the new starter introductions are quick and simple

7. Add in 'hints and tips' e.g. not just what 'should' happen but what you 'anticipate' – there are diplomatic ways of hinting to the new starter what may prove challenging for them.
8. Take some of the pressure off for the new starter, if you know the ideal situation may be possible but not entirely realistic, add in this information. Explain the ideal situation versus what will also be acceptable for the project. This helps a new starter to understand the parameters in which they should work.

9. Add in hyperlinks to all official documentation – contracts, billing arrangements, budget sheets, reports…

Skeleton project management checklist

1. Working in a team
- Organigram
- List of roles and responsibilities
- Reporting process

2. List of meetings that project team and stakeholders are expected to attend
   Starting up a project, regular core team meetings, satellite meetings, 'wash up' meeting, evaluation
   Document how the minutes from the meetings should be typed up, distributed and used by the project team.

3. Create a filing structure for all project documentation

4. Draw up a Project Brief – including the business case

5. Agreements – drawn up and signed

6. Draw up a list of project sponsors and partners – how do they impact your project activity and deliverables?

7. Client Relationship Management – create a system for logging suppliers that you regularly use. Contact details, the rates they charge, notes about what it was like working with them.

8. List of project paperwork expected as a minimum and note how frequently the paperwork should be updated and who by
- Risk Register - IF [cause], THEN [risk], SO [EFFECT] on project objective

- Lessons Log
- Organisational processes and procedures that your project must align with
- Legal advice to align with
- Admin credentials and user logins document for users to refer to

9. Schedule – for internal use with detail and a stripped back version for external use e.g. milestone deliverables

10. Committees and boards that your project must report to – a schedule of preparing documents, sharing with others to comment, issuing by the deadline.

11. Budget sheet
- Process for reforecasting

12. Marketing and Press – who should hear about your project and how? Private versus public. What is your message to the public?

13. Evaluation, monitoring and archiving

- Check contracts and agreements - have all deliverables been honoured by all parties?
- Has all documentation been collated? Images, final versions of documents, materials associated with the project, anything that captures the project that future projects and your organisation will find useful… whilst adhering to privacy and legal guidelines (e.g. GDPR, auditing)
- Confirm no more expenditure is expected. Have all contracts been paid? Has the project been paid where owed?
- Have the project folders been tidied to ensure easy access for future users?
- Has a wash up meeting taken place and a report written up?

Links to helpful websites

An Introduction with links to further information
https://www.apm.org.uk/resources/what-is-project-management/

Vocabulary and templates
https://www.projectmanager.com/blog/prince2-methodology
https://www.pmis-consulting.com/articles/

Managing change
https://prince2.wiki/theme/change/

Appropriate documentation
https://yourprojectmanager.com.au/7-core-project-documents-prince2-projects/

Project Management blog – keeping up to date
https://www.apm.org.uk/blog/#/