Project Management Overview

This document

This document is focussed on establishing a community managed Library but we hope you will find the learning transferable to smaller projects they may arise during the course of running your library.

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1. Introduction to Project Management

Project management is one of the cross-cutting themes in establishing and running a community managed Library. A project involves achieving an objective within a set time-frame. In this case getting your community managed library up and running. Project Management differs from Service Management because Service Management will be an on-going activity for as long as you are running your library.

2.   Project Management Lifecycle

The Industrial Society (www.indsoc.co.uk) describe the Project Management Lifecycle as having four phases:

- Phase 1: **'D' – Conception and Definition** – Identifying the need, agreeing a solution, setting and checking aims and objectives.
- Phase 2: **'P' – Planning –** Agreeing milestones and stages, putting tasks against a time-line, and identifying resource requirements.
- Phase 3: **'E' – Implementation and Execution –** Putting the plan into action, monitoring performance, and exercising control and influence where necessary.
- Phase 4: **'C' – Run-down & Closure** – The transition of the Project into a Service, including completion, evaluation and handover to the service management team.

This process has been designed for an industrial organisation and so is unlikely to run as smoothly as you might hope in the social and political context of most community managed libraries but it is still a useful framework to help maintain focus and consider progress.

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3.   Project Management and the stages of Asset Transfer

The Asset Transfer Unit (ATU) has identified six stages common to most Community Asset transfers. These are:

1. **Getting Started** – identifying the need, gathering support, and setting objectives
2. **Getting Investment Ready** – detailed planning so as to attract financial support
3. **Taking a stake in an Asset** – acquiring legal ownership or a right to occupy
4. **Property Development** – refurbishment of an existing structure or creating a new-build
5. **Premises Management** – running the facility
6. **Growing the Asset Base** – identifying and evaluating potential property acquisitions

In addition Community Assets which are closely associated with a specific service, such as libraries, need to also carefully consider:

- **Service Development**; and
- **Service Management**.

There is a more detailed overview of these stages in the "Community Knowledge Hub" toolkit. Suffice to say, each of these stages has a range of milestones and different areas of work within them. Table 1 (below) shows how different elements of each stage relate to the four phases of Project Management.

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TABLE 1: Examples of the relationship between Phases of Project Management and Stages of Asset Transfer

	Getting Started	Getting Investment Ready	Taking a stake in an Asset	Property Development	Premises Management *	Service Development	Service Management*	Growing an Asset Base**
Project phases								
Definition	Agreeing a Purpose; Setting Objectives;	Identifying required Scale of Investment	Site Specification	Building Specification	Facilities Specification	Needs Analysis; Service Specifications.	Developing Service Level Agreement (SLA); Establishing Success Criteria.	Initial options appraisal; Identify potential project resources.
Planning	Pre-feasibility Study	Developing Funding Strategy	Site Selection; Business Planning.	Building Design	Setting Service Charge Budget	Service Design	Agreeing Resources to be used.	
Execution	Formalising Group Structure	Fundraising	Negotiating Management Agreement	Construction; Snagging	Base-line Risk Assessment	Building and testing of systems; Recruiting personnel	Performance Management Systems Implemented	
Closure	Ensuring Governing Docs and strategy in place for future management.	Completion of funding returns for project implementation.	Legal papers archived; lease or covenant requirements in operations manual.	Formal Handover	Risk Assessment and Action Plan documentation in place; Operations manual for building in place.	Training Staff	Policies, Procedures, and guidance agreed and published for internal use.	

* Premises Management and Services Management continue beyond the project implementation phase.
** Growing Asset Base is largely a Pre-project phase to ascertain if a project proposal to acquire a new building has any merit.

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4.   Project Management Tasks

Active project management creates a workload in its own right. This additional investment of time is justified by the time and cost savings made through avoiding misunderstandings, duplication, and mistakes. The key Project Management tasks associated with each phase are outlined below:

Definition

Key tasks in the Definition Phase include:
- Agreeing aims and rationale
- Forming a project team
- Identifying key stakeholders
- Developing SMART objectives
- Agreeing scope of work and key stages
- Stating required standards and specifications
- Designing systems and procedures
- Completing a risk assessment for the project
- Completing a feasibility study
- Gaining approval to proceed

The importance of bringing clarity and getting buy-in during this phase cannot be underestimated, as it forms the foundations for the rest of the project. Cutting corners at this point can lead to costly mistakes and great frustration as disagreements emerge later in the process.

Planning

Key tasks in the Planning Phase include:
- Agreeing milestones and control points
- Defining activities
- Sequencing activities and identifying dependencies
- Defining roles and allocating responsibilities
- Resource estimating and budgeting
- Duration estimating
- Revising Risk Assessment and Contingency Planning
- Developing a schedule

All project plans suffer from the "triple constraint" – quality, time and budget. The success of a project is affected by balancing these three project constraints.

Execution

Key tasks in the Execution Phase include:
- Managing people to keep the project moving
- Monitoring progress and producing reports
- Maintaining project documentation
- Re-scheduling as necessary
- Procurement and Contract Management
- Budgetary and Cost Management
- Stakeholder Management and Communication

Execution is usually the most exciting phase in Project Management but Project Teams, particularly small ones, must be careful not to get so caught up in implementation tasks that they neglect overall Project Management.

Closure

The Closure Phase involves:
- Confirming project completion i.e. meeting success criteria
- Finalising project documentation
- Ensuring interim on-going support is in place
- Completing training of operational staff
- Handing over facilities, equipment, and management if necessary
- Project evaluation

Arguably the hardest phase of Project Management to stay motivated as the operational staff begin to take-over. Often some kind of handover or celebration event helps maintain a little more focus until the end of evaluation and project documentation.

5.   Key Roles in Project Management

One of the keys to successful project management is a strong team with clear roles and responsibilities. While detailed role specifications will need to be developed in the Planning phase, the list below outlines the types of roles to be considered:

- **Project Sponsor** -– A highly influential figurehead for the project who can intervene at senior levels. They may already be or may become a member of your board

- **Supporters** - High profile advocates of the library who can influence agendas and attract further support to aid implementation

- **Project Manager** – The individual overseeing and driving the project forward by co-ordinating the activities of the Project Team on a day-to-day basis.

- **Project Team** – Those people consistently and regularly working and meeting to plan and implement the project. Depending on the size of your organisation this may be a mix of paid staff and volunteers. If you are starting from nothing, much of your early work will be about finding the people to form this team.

- **Professional Advisors** – For a project as complex as establishing a community managed Library (especially if you are undertaking property development) you will need the advice of a range of specialists from lawyers to surveyors at different points in the project. The skills within your project team will usually determine how dependant you are likely to be on these advisors. So, an internal Skills Analysis should be undertaken in the planning phase.

- **Other Stakeholders** – Your project will impact on and be impacted by a huge range of people – stakeholders. You will need help and support from many of them as you develop and implement your plans. This makes Stakeholder Analysis and prioritisation followed by on-going Stakeholder Management critical to the project's success.

6. Areas for Special Attention

As can be seen from above, Project Management requires a diverse team to maintain focus on a wide-ranging programme of work while managing various resources. In order to stay on-top of these requirements some areas need special attention. These include:

Project Time Management
Project time management is probably the element of project management that gains the most attention, as missing a deadline is a high-profile issue and the resulting time delays can often be costly.

Project Cost Management
Project Cost Management involves planning, estimating, budgeting and controlling costs to bring a project in within an approved budget. It is closely related to Procurement Management.

Procurement Management
Project procurement involves all the processes associated with contracting with organisations for products and services to complete the project. This includes contract management, change control and contract administration.

Project Communications
Project Communications are critical to the success of the project - planning the communications in advance saves time and energy further down the line and ensures that the right people know what is happening at every stage of the project. In any project, particularly a community based property development project, there are many internal and external stakeholders who will assume hearing nothing means that nothing is happening. Project team members from external organisations therefore need to be kept informed, as do internal organisation staff.

People Management
People management is a critical component of managing a project. It is important to involve team members in the project planning processes as early as possible. Getting involved early results in a plan that is more accurate and strengthens the project team member's commitment to the plan. Once the project is being implemented it is vital that the project manager has planned out the project roles, responsibilities and reporting relationships so that everyone knows what they are to do.

Quality Management
Project quality is very important in making sure the project delivers a product that is "fit for purpose". It also provides assurances that the product is built to meet the client's specifications, reducing rework costs in the longer term. If the project fails to meet the specified quality requirements it can have a negative effect on any or all of the project stakeholders and in the ability of the project to deliver the required impact.

Managing Project Risks
The overall objectives of managing risk within a project are to increase the probability of the events that have a positive impact on the project and reduce the probability of the events that have a negative impact on the project. Risk Analysis will identify and quantify risks so that actions to mitigate against them can be prioritised to increase the overall chances of success.

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7.   Top Tips

Project Management is often seen as just as a set of procedures to follow, but it also very much about people.   Managing projects involves managing people and relationships with stakeholders, clients, partners and suppliers. As a Project Manager, avoid focusing just on processes and procedures and ensure a significant amount of your time is dedicated to communications and the building and managing of relationships.

Avoid making decisions in isolation. Remember, there is always a solution to a problem, but it often requires cooperation from many parties to arrive at a solution that everyone can feel happy about.

8.   Further Information

Project Management

The following organisations and additional resources may be of value:
- The Project Management Institute (www.pmi.org)
- Association for Project Management (www.apm.org.uk)
- National Occupational Standards for Community Development
  (http://www.ukstandards.co.uk/nos-
  search/Pages/SearchResults.aspx?sq=1&k=the%20reflective%20community%20develop
  ment%20practitioner)
- Free Project Planning Resources http://www.businessballs.com/project.htm

Commnity Managed Libraries

This resource has been produced for the Community Knowledge Hub for Libraries, brought to you by Locality (see – www.communityknowledgehub.org.uk). If you would like to seek further advice on any of the issues raised here please contact email info@CKHlibraries.org.uk or contact Locality on 0845 458 8336.

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