Practical Project Management



About this course

This course is designed for anyone who wants to feel confident about how to set up, manage and end any sized project. It uses core project management discipline, made appropriate for socially driven organisations.

This course is **not** about business planning, but includes skills used in business planning. Nor is it about designing and creating a project from scratch, though there are elements of that. Rather, it covers what is good to know from mapping out a known project, running a project, dealing with the 'nuts and bolts' to maintaining strategic oversight. It is operational management, starting from the beginning and moving through the life of a project.

The course flows from project management background, through some tools which can help, to the qualities and skills needed by a successful project manager. All of the sections have learning activities.

The course contains:

- some key terminology relating to project management
- some easy-to-use tools to help map out and manage a project
- how to report back on a project
- basics of how to evaluate a project
- how to delegate successfully

This course booklet contains many resources. It has been designed to provide a long-term resource for future reference.

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Practical project management

Good project management is having an informed practical hold on all aspects of a project. It is the reality of:

- Unpacking a head into a logical plan
- Unpacking collected knowledge into understandable transparent processes
- Reducing the risk to the organisation and to ourselves
- Being faithful to the organisation's purpose

Project Management is having the most overview while understanding the closest view; seeing the big picture while intimately knowing all the details. The good project manager is able to hold the vision and translate outside of the project to those who need to know and inside the project to those who are part of the project.

Project Management requires two key skills: being strategic and having the ability to implement details. These skills are seldom, if ever, found in the same person. Excellent strategic thinkers need colleagues who remind them *what* needs to be done. Detailed implementers need colleagues who can remind them *why* things need to be done.

Project Management is **Practical**

- matter-of-fact, realistic, workable, feasible, down-to-earth

Project Management deals with discrete **Projects**

- a set of activities which ends with a specific accomplishment
- a set of activities grouped into three phases – beginning, middle, end
- distinct start and finish dates
- resource allocation and constraints

Project Management requires **Management**

- organisation, supervision, clear administration

⇨ **A Programme is a stack of Projects**

Whether large or small, simple or complex, project management includes key overall work areas (which are detailed in the following pages of this resource book):

Hopefully, before a project begins:

1. identify goal (outcome, purpose)
2. identify context, including stakeholders and resources
3. identify tasks
4. order tasks: milestones, dependencies, constraints - parallel, overlapping, sequential
5. delegate tasks: actions details, reporting arrangements
6. identify risks

During the life of a project:

7. monitor tasks: Gantt review, communications
8. report tasks: documentation
9. evaluate tasks: slippage, lessons learnt

Task language is clear and simple: 'do **this** by **then**'.

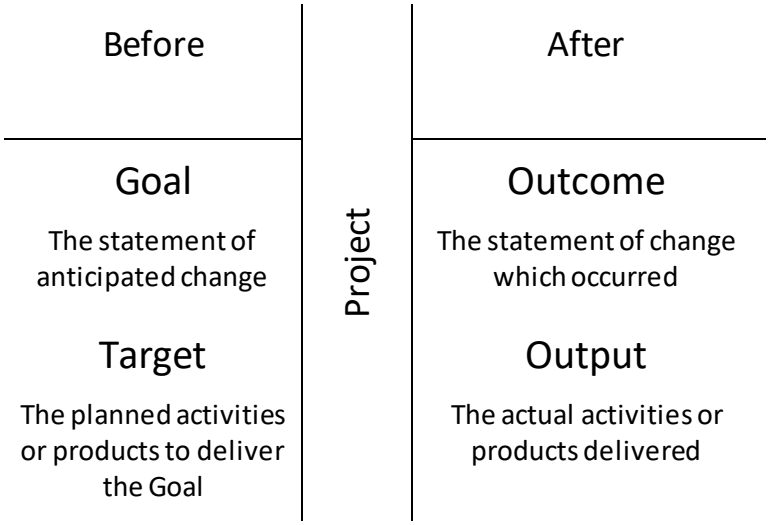
Section 1: Project Preparation

1.1 Outcomes and Outputs

Identifying the goal of a project is more important than often realised. Holding a lunch club is merely holding a lunch club. Holding a lunch club as a means to help homeless people to gain confidence and knowledge is quite another. The goal of the project is to increase confidence in people who experience homelessness. The lunch club is just the tool.

In the commercial sector, goals are often quite tangible – create a market brand, manufacture this, sell that. In the social benefit world of charity, social enterprise and the public sector, goals are often the 'soft' outcomes; **more** confidence, **increased** work readiness, **reduced** abuse, **more** involvement. In the social sector, outcome language looks like success measure language used for evaluation. But project outcomes are practical goals toward which we plan delivery activity. Identifying the goal creates targets which it takes tasks to achieve, and good task creation is a core of good project management.

Output, outcome, target, goal, aims language can be very confusing and different funders use words in various ways, not all of them clear. It is helpful to think of before and after project delivery. Before a project, there is a Goal or an Aim – something to achieve, the vision of a changed situation. After a project, there is an Outcome – something which has been achieved, the reality of how something changed. That said, the social benefit sector of charities and social enterprise uses the **after** project language almost exclusively, both before and after a project delivery.



So in the example of the lunch club above, the project goal/outcome is to increase confidence and knowledge in people who experience homelessness via a lunch club; targets/outputs could be gain understanding of confidence levels, create ancillary support, hold a weekly lunch club.

1.2 Frame the Context

Effective project preparation is a process of understanding how an individual project fits into the whole life of an organisation, similar work and wider communities. Though a project itself is finite with clear boundaries, it always sits within a much larger context. That wider context can impact a project both negatively and positively. To have a good understanding of the wider context can help engage people with the project goals, can inform project tasks, can gain advocates and much more.

To frame the context well will help secure decisions and permissions for a project. Every element of this map may lead to sign-off, commitments and agreements – all before a project even begins delivery. Indeed, delivery should not begin until all permissions and agreements have been achieved. The map becomes a much used project reference tool.

Stakeholders - Who is interested? Negotiating partners Task partners and task personnel Users and staff Supporters/volunteers Decision makers and partners Government and regulators Community neighbours and public bodies Suppliers Media and Interest groups (There may be negative stakeholders)	**Resources** – What and who is available? Particular people with skills Existing organisational teams Owned or promised specialist equipment Owned or promised catering Accommodation or venue use Promised media coverage (are there gaps which identify needs?)
Outcome	
Funders – Who is providing finance? The project organisation Special funders Charitable trusts and foundations Partner organisations Public donations Income from activities or products	**Outputs** What are the core project delivery areas?

- The project communications plan will include those on the left side – stakeholders and funders
- Agreements may need to be made with those on the left side and the top right section to secure stakeholder commitment and to ensure commitment of resources
- The outputs become the project's key delivery areas and feed directly into the project plan

Example Context Map

Improve confidence and knowledge in homeless people via a lunch club	
Stakeholders	**Resources**
who cares?	*What people or things already exist to help?*
People experiencing homelessness	This organisation's workers
Larkhill Community Partnership	Health Visitor
Countryshire Council	Back Road Cafe
Homeless people in the Larkhill/Urban Road area	Rainbow Bus Company
Urban Health Care Trust	Urban Road Community Newspaper
Citizens Advice	Radio Countryshire
St M's recovery from homelessness team	Back Road Café Facebook group
Funding	**Outputs**
Where is funding for expenses and material coming from?	*What are the key areas of work?*
Larkhill Community Partnership	Understanding of confidence levels
Countryshire Council	Ancillary support in place
Awards for All	Weekly lunch clubs
This organisation	More self awareness in people with homelessness
In kind from Back Road Café volunteers	More knowledge to deal with homeless issues

Section 2: Tasks

2.1 Outputs to Tasks

Each output to achieve an anticipated outcome needs a range of activities to achieve it. To deliver *this* lunch club for these reasons, we need to do *these* things. We need to organise this, book that, register the other and advertise it all. These are practical day to day actions to ensure that an output is reached. In other words, and in Project Management language, practical day to day actions are TASKS.

Task language is quite clear with verb-object phrases. Do this. Book room. Organise menu. Recruit staff. Train volunteers in reception duties. Receive Sign-off. Task language is short, clear and concise. It is not headings, such as *Finance* or *Staff*. Each task statement needs to have a clear understanding of what will have been done when the task is complete.

Tasks are created from the output statements developed in the context work at Section 1. Each output statement is rephrased to become a task statement. So, with the project to help homeless people to gain confidence and engagement, output 3 is "Weekly lunch clubs". We turn this into task language by adding a verb, so the output turns into the task, "Hold weekly lunch clubs".

From there, each output task becomes a high level project task with a range of activities – sub-tasks – to accomplish it. It helps to think up tasks by asking, "how we will do this?" Ah, we'll do this. If a question is, "do we need volunteers?", then a formal task is "agree volunteer involvement."

Our example project output 3 high level task is now *Hold weekly lunch clubs.* Asking just how to do that could provide tasks such as:

1. Hold food decision research with target groups
2. Agree catering and style
3. Agree venue
4. Run lunch clubs

When studying each of these tasks, it is clear that they are still relatively high level – they will need many smaller tasks to achieve them. They'll have sub tasks. So, for output 3, now task 3 (hold weekly lunch clubs), task 2, 'agree catering', there may be sub tasks such as:

1. Obtain conclusion of food decision research
2. Agree catering type
3. Agree caterer criteria
4. Gather potential caterer details
5. Conduct caterer options appraisal
6. Receive caterer agreement from team director
7. Appoint caterers
8. Agree catering arrangements

2.2 Task Analysis

Words abound in project management – but there are a few to really treasure as they hold so much information. After the word Task, three are the most used - Milestones, Dependencies and Constraints. On some planning charts, they have visual representations (triangles, arrows, stars – all linked by solid or shaded bars…), but there is no universal shape to represent these words. In whatever planning group, come up with whatever visual works – as long as there is a key so others know what is meant.

Milestones
Milestones are an event or task to which a whole host of other tasks contribute. They are the huge achievements, which if are not accomplished, can have a significant impact on the whole of a project. Simply, they are usually either:

- an accumulation of tasks coming to a single thing – research conclusion, selection from recruitment, significant numbers of things done, decisions made
- fixed time points in calendars – deadlines, significant events

There are three types of milestone:

1. **Decision** (go / no go; project start; choice)
   This milestone is an accumulation sort of milestone. Research would build up with a group of tasks investigating, say, costs, or market research to decide whether to run a project or to decide when a project starts its activity. A go/no go milestone is a decision which concludes research to test an idea; a project start milestone is a decision concluding research about ideal project timing; a choice milestone is the decision concluding research about options.

2. **Progress** (interim milestones and final goal)
   This milestone is associated with the achievement of planned activity, such as numbers of things done, numbers of bookings received, proportion of project activity delivered. Information from progress milestones feed into reporting periods, organisational deadlines or meetings for reports.

3. **Event**
   This milestone is the simplest – a one-off occurrence. It could be a meeting, an occasion, receipt of sign-off or permission, the receipt of a document.

Milestones can be moved but watch out for Dependencies and Constraints. These are tasks or other influences which will stop a milestone being achieved.

Dependencies
Dependencies are the tasks on which a milestone is dependent. Planning charts will show 'stacked' tasks in the order in which they need to be done. Dependencies let us know the order which cannot be changed.

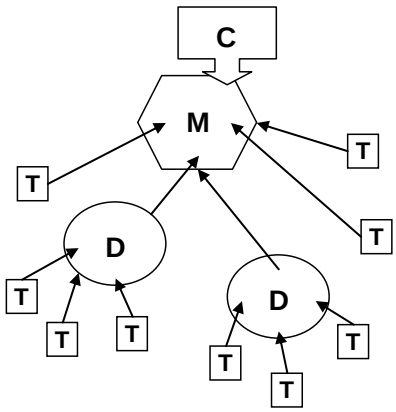
- before this, then this, and before that, then that...
- can't appoint staff until a job description has been written and circulated
- can't send out the invitation (event milestone) until a choice is made about the venue, date, time and activities
- important with contracts and projects: "I can't do X until you have given me Y"

Constraints
Constraints on a planning chart will look just like milestones, but - they are things can't be fixed! And they are things which will stop a project dead in its tracks. They are different from things which feel constraining (not enough finance, not enough volunteers…), in that they are impositions (no planning permission, work outside the area of benefit, office closures). Constraints are generally external, such as legislation or significant external agreements and they often feature some form of permission, such as:

- No permission to fund raise on pavement outside particular venues
- Activity falls out of the Charitable Objects Clause
- No planning permission for an activity or a building

If there is confusion about what Constraints there may be around a project, it is helpful to ask other people or organisations who are working in the same kind of activity, or with the same kind of people, or within the same sort of geographical area.

This chart is an overview and shows that the Milestone (M) is dependent on certain tasks being achieved so that the Milestone can be reached. It is dependent on individual tasks and on Dependencies (D), each of which is an accumulation of tasks. Constraints are the largely external forces over which there is no control, which could stop the achievement of a milestone.



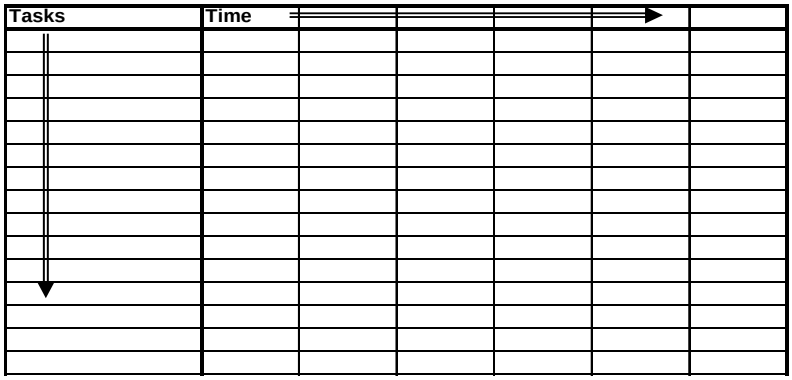
Parallel, Overlapping and Sequential Tasks
Some tasks need to refer to each other in different ways, depending on whether more than one task can be carried out at the same time, and if the task series is important. It is good to see if tasks further relate to each other, to understand how best to chart them on a project plan, and particularly which ones to focus on for fine monitoring.

- **Parallel** task are those tasks being carried out in the same time frame. Showing parallel tasks indicates if there might be a strain on personnel; more than one task in one time frame means, quite simply, more than one person being busy.
- **Overlapping** tasks are those being carried out in the same time frame with one starting before the other. This could be a strain on personnel at the point of overlap.
- **Sequential** tasks are those carried out in absolute order, with one not able to begin until its predecessor has been completed. This is linked to the concept of dependencies and is important to note in case of slippage of any of the tasks in the sequence.

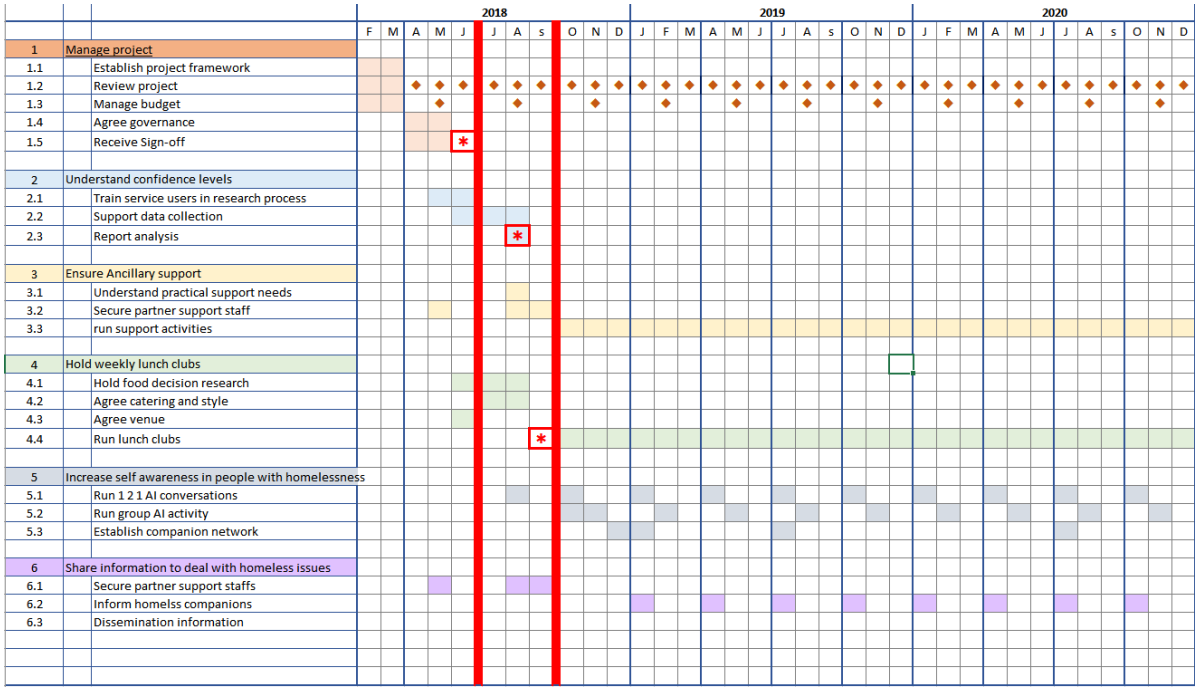
Section 3: Project Task Timing

3.1 Gantt Charts

Gantt charts are the core of project management methodology. Designed by Henry Gantt, the early 20th Century industrial engineer and researcher, they work the magic of exposing the time it takes to do tasks and the complexity of tasks. In simple 'to do' lists, time is hidden when a task is written down; only the writer knows if a task in a list represents mountains of work or a moment. When a chart is used with row headings as tasks and column headings as time increments, with filled in cells to indicate activity, then the To Do list timings are exposed and understood.



Gantt charts show relationships between tasks, making clear milestones and dependencies, visually demonstrating linkages and hierarchies. The beauty of using a Gantt is that when plans go awry (as they do), there is an understanding of how a missed task affects another task and how such 'slippages' affect the resources and timing of a whole project. Gantt charts help make projects transparent, help make monitoring as simple as possible and help to make it easy to share project information.

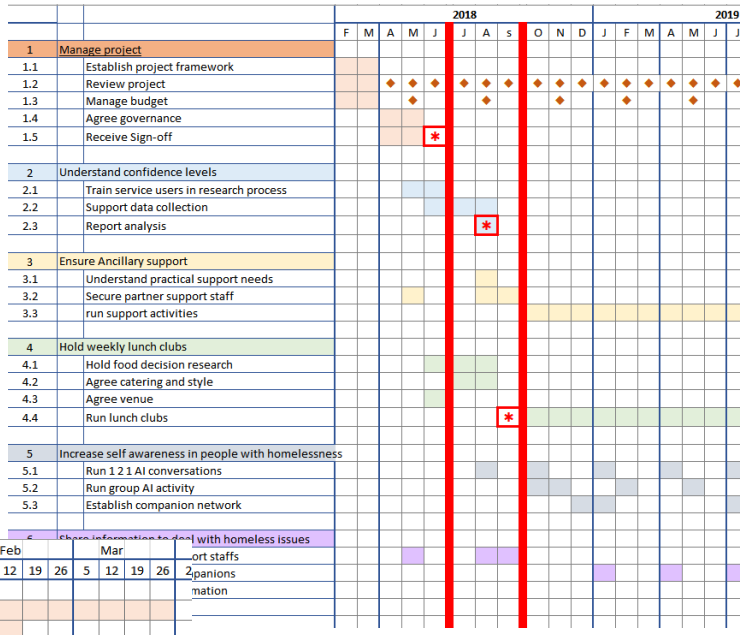


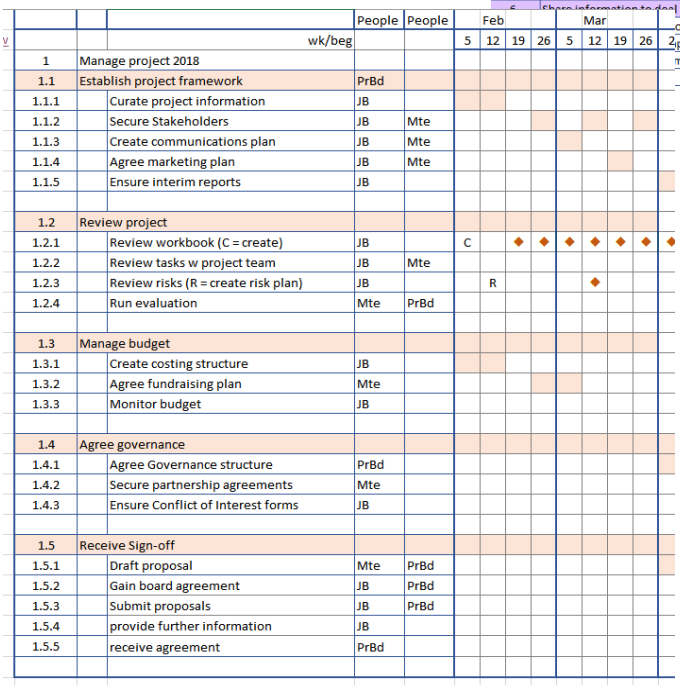
Gantts can be called anything – project timetables, project plans, project overviews - but the core tool is the Gantt.

As Gantt charts were developed in relation to industry, most of the information about them and their use is related to large scale projects and contains a high level of industry vocabulary. However, the key tool – separating out task from time in order to understand each – is incredibly useful in the social benefit sector, and indeed, any kind of project.

Projects will seldom have one Gantt, as a key feature is that each Gantt should show the whole of the project tasks and the whole of a project's time. To do this, a project Gantt will need one Gantt with, say, a five year period over increments of yearly quarters and a task list giving merely the key high level tasks. Further Gantts will be breakdowns of time frames and task areas, each Gantt whole in its own right, showing the whole task range and the whole time frame on one sheet. The reason is that to plan and monitor one task, each task needs to be seen in its context; to have to scroll or flip to other tasks of the same rank means that the context can become confusing.

The highest-level Gantt, showing the longest timeframe and all the task headlines is the Gantt most needed by decision makers such as stakeholders, trustees or management teams.





The first sub Gantt, breaking down each high-level task area to its more detailed tasks is most used by management groups and task team groups. All further sub Gantts are detailed for delivery groups, delivery sub teams and individuals.

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Moving from Context to Gantt

Improve confidence and knowledge in homeless people via a lunch club	
Stakeholders	**Resources**
who cares?	*What people or things already exist to help?*
People experiencing homelessness	This organisation's workers
Larkhill Community Partnership	Health Visitor
Countryshire Council	Back Road Cafe
Homeless people in the Larkhill/Urban Road area	Rainbow Bus Company
Urban Health Care Trust	Urban Road Community Newspaper
Citizens Advice	Radio Countryshire
St M's recovery from homelessness team	Back Road Café Facebook group
Funding	**Outputs**
Where is funding for expenses and material coming from?	*What are the key areas of work?*
Larkhill Community Partnership	Understanding of confidence levels
Countryshire Council	Ancillary support in place
Awards for All	Weekly lunch clubs
This organisation	More self awareness in people with homelessness
In kind from Back Road Café volunteers	More knowledge to deal with homeless issues

The overview Gantt is created by taking the outputs from the Context sheet and entering them in the Gantt as Task Areas 2 and following. Task area 1 is always 'Manage Project.'

			Personnel	Personnel
		wk/beg		
1	Manage project			
1.1		Manage project framework		
1.2		Review project		
1.3		Manage budget		
1.4		Establish Site framework		
1.5		Receive Sign-off		
2	Understand confidence levels			
2.1		Train service users in research process		
2.2		Support data collection		
2.3		Report analysis		
3	Ensure Ancillary support			
3.1		Understand practical support needs		
3.2		Secure partner support staff		
3.3		run support activities		
4	Hold weekly lunch clubs			
4.1		Hold food decision research with target groups		
4.2		Agree catering and style		
4.3		Agree venue		
4.4		Run lunch clubs		
5	Increase self awareness in people with homelessness			
5.1		Run 1 2 1 AI conversations		
5.2		Run group AI activity		
5.3		Establish companion network		
6	Share information to deal with homeless issues			
6.1		Secure partner support staffs		
6.2		Inform homelss companions		
6.3		Dissemination information		

There is computer software to create projects and show them in a Gantt chart view, yet most of the software available to use is industrial strength, most often used to measure complex projects against budgets. Any spreadsheet computer programme will do the simple job of listing tasks as row headings in a left-hand column and time as column headings moving to the right of the tasks. Spreadsheet cells can be coloured, can have bespoke borders to show things like meetings or milestones and the drawing tools can help add arrows or other symbols to depict the real story of the task at hand.

Any squared paper or coloured pencils and pens can be used for Gantts. Squared paper books can be used with sub Gantts on associated pages. However, using software not only allows more detail, but also means that the Gantt can become much more than a chart; it can become the place in which all project information is collected. With robust use of hyperlinks, the Gantt becomes the home for all project information, with links to other pages in a workbook, to other spreadsheets (budgets, targets, etc) to documents (say, minutes of meetings or project information), folders (such as emails saved as text files, reports to funders), email lists, videos, photographs – anything which the project will need to operate. The Gantt becomes the vehicle to fully manage a project in operation, in effect, a document and information explorer – a Project Workbook. A tip is to create a shortcut to project Gantts on a computer's desktop. Then each time a project is opened, even just to retrieve a document, the entry is via the Gantt. This helps strategic people be reminded about details and it helps detailed people recall the bigger picture.

Though setting up all this information might appear to be time consuming, it is shockingly time saving over the life of a project; in place of running independent (and frantic) searches through email lists or electronic folders or documents, linked Gantts mean one click opens the folder of emails for the project, to the template for regular reports or to any other project information

Tip – **Use real dates**. Even if copying a Gantt from one project to plan another one exactly the same, real dates can often mean that some tasks will need to be ordered differently.

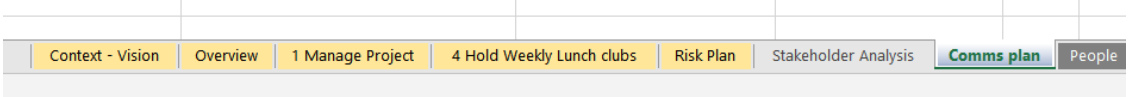
Tip – **Enter dates which may affect the project.** If a community has events which the project may use, this will be good for the Gantt planning. Likewise, if key people have holidays, or there are key religious celebrations which affect a project, it will be important to note this in the Gantt.

Tip – **Use a Gantt for future planning only**. Though it may be tempting to use a Gantt to understand or to capture history about a project, it is not possible to plan the past, only to best guess/plan from today onwards. To understand a project's history, simply add 'audit project to date' in the Manage Project set of tasks on a Gantt.

Tip – **Add any tasks associated with Stakeholders, Funders and Resources**. Context map Particularly if promises or sharing agreements need to be followed up, it will be important to add that information to the Gantt.

3.2 Gantts in a Project Workbook

This coursebook and the DSC Practical Project Management course advocates the use of an Excel workbook of multiple worksheets some of which are Gantts and some of which are core project information. The whole workbook is named a Project Workbook and becomes more like a project explorer, allowing easy overview of a wide range of information. The context work (Section 1) is the starting worksheet, followed by the Overview Gantt (Sections 2 and 3), then any sub Gantts. It will also include a sheet on risk, on resources, on people, and may go on to include any tables of information needed to run a project. Instructions to set up a workbook are in Section 8.



Workbooks can be huge, so a good use of hyperlinks can help move quickly around what can develop into complex information. Hyperlinks can also lead out of the workbook to other programs such as email programmes or websites. A simple link within your project workbook can take you directly to websites you might need to update, for instance, without you having to leave your workbook, find the explorer programme and enter the web address. The time eventually saved can be significant. Instructions on hyperlinks are in section 8.4.

There is a wide variety of bespoke project management software available. Experience shows that many programs are too large, complex, and unyielding for the social benefit sector. Many use significant jargon which has to be learned and many expect what our sector may not deliver. It will be impossible in many cases to say what percentage of a task is complete, for instance. If we are making community contacts and our outreach brings more beneficiaries to a project than we fist expected, we may never be able to say when we've reached 100% of a task. Excel (open source or other) is the simplest and most flexible Gantt creation tool, allowing the core project management principles of planning task over time to be well understood.

Section 8, at the end of this coursebook, gives key information on how to use Excel for Project Workbooks.

TIPS

- You can **copy your Gantts as pictures** in other programmes. Select the Gantt from the bottom right hand corner and work to the top left and select copy. Go to the programme you want to add it to, then in the Edit menu, select 'paste special' and click 'enhanced metafile' or 'bitmap', then manipulate the image as any picture. If you need to make changes, go back to your spreadsheet, then re-paste.

- You can **print your Gantts as wall charts**. Use your printer's feature to print one sheet over many pieces of paper, then tape or glue together.

- When you set up project files, create electronic or paper folders with the exact names as your Gantts and sub Gantts. With electronic files, this makes easy hyper linking to the Gantt tasks.

A word of **warning**. Ensure to be are careful about digital project files and who has access to them. If a project workbook is hyperlinked to files and other people move them, the workbook will not be able to find what it is looking for. If there is a shared file server in an organisation, ensure that permissions are changed so that only the project manager can rename or move project files.

Section 4: Risk

4.1 Risk Management Plan

'What can go wrong will go wrong' is rather a pessimistic view, but that nothing will go wrong is living in the clouds. Something always will go wrong. Risk Management is moving from task to strategy, planning ahead for change. And a Risk Management plan is best created before the final Gantt; it will invariably create tasks to be added to the Gantt.

To address risk is not to 'borrow trouble' but to be prepared to deal with risk (mitigate) if it arrives. A formal risk analysis begins with no more than dreaming up all sorts of disasters, large or small, moving to thinking of how the organisation would respond to them, then analysing how likely they would be and how awful they might be (impact). A register, or list, of risks is drawn up, and they are analysed against agreed criteria to find out just how important it might be to be prepared for them.

Project risks are project, not organisational, though they could lead to organisational issues. It is good practice to analyse risk before the final Gantt is finished, as risk actions frequently lead to new tasks. If the full range of risks is not known, confer with those who work with the same sort of people, the same sort of activity or in the same geographical area

RM demonstrates preparedness and good management and can help in case of complaints. If you are the sole project manager, it is essential that the project risk planning is shared with Trustees, Line Manager, and if necessary, Stakeholders.

Types of Risk
Each organisation will have its own types of risk, but the Charity Commission has seen common risks in charities, identified in Charity SORP (the Statement of Recommended Practice, Accounting and Reporting 2005):

1. *Governance risks* – decision making areas such as inappropriate organisational structure, difficulties recruiting trustees with relevant skills, conflicts of interest, partnership board members without decision making powers.
2. *Operational risks* – operating areas such as service quality and development, contract pricing, employment issues, health and safety issues, fraud and misappropriation.
3. *Financial risks* – financial pressure areas such as accuracy and timeliness of financial information, adequacy of reserves and cash flow, diversity of income sources, investment management, over commitment of resource.
4. *External risks* – reputation and environmental change areas such as public perception and adverse publicity, demographic changes, government policy.
5. *Compliance risks:* law and regulation areas such as breach of trust law, employment law and regulatory requirements around particular activities such as fundraising or running care facilities.

The reason to identify type is to engage with people with skills in those areas in order to consider and manage risk.

Risk Responses:
Once risks have been typed, it is important to decide how to respond to them:

1. accept the risk (some things just are)
2. minimise the impact of risk (wear a helmet)
3. transfer the risk (get insurance)
4. reduce the likelihood of risk (train, inform)
5. deploy fall-back plans (create plan B)

Actions
Having decided the responses to each risk, and then analysed each risk, (4.2, following), the next task is to decide what action to set in place to deal with the response to high risks. So, say, training to reduce likelihood might mean setting a training programme in place. Only high risks need to have action plans; other risks will need to be monitored just to make sure that they are still as first analysed, but there is no point doing full action plans for risks which may never happen.

Monitoring Activity
This is a description of what is done to make sure the risk is monitored. If a training programme has been established to reduce the likelihood of a risk, then monitoring activity may be to regularly see the training registers, or setting training cycles and monitoring them. It could be putting financial protocols in place.

Lead for Risk Actions
The day to day risk management is seldom the Project manager. It should be the person closest to the potential risk. So an activity project should have the risk monitored by, say, an activity leader. The Project Manager would, as part of their risk monitoring, see the registers of that activity.

Timing of Reviews by Manager
This is how often will the monitoring activity be checked to see that is happening. Will it be monthly? Quarterly? More or less frequent?

Managing Risk
A simple chart can be used to track the management of risks and include all the information collated under the above categories. Once the register, or list, is created and ranked, then the entries are put in a chart or spreadsheet similar to this book. Most columns are self-explanatory.

Good risk management is the regular monitoring and updating of risks. In some organisations, a spreadsheet like this can be electronically linked to others which contain far more detail in each entry.

4.2 Risk Analysis

Over time, practiced Project Managers will be able to judge the ranking of a risk as low, medium or high. But in cases where it is not easy, this matrix is a useful tool for analysing risk based on the likelihood that an event might occur and on its impact if it did occur.

The criteria for assessing risk come from SORP 2005 (Statement of Recommended Practice, the Charity Commission):

Likelihood

1. extremely unlikely
2. unlikely
3. moderately likely
4. regular occurrence
5. highly likely
6. extremely likely; frequent occurrence

Impact

1. not critical
2. minor impact in some areas
3. minor impact in many areas
4. significant impact; would not affect continued operations in the short term but might in the long term
5. significant impact in medium term, relates to substantial operational areas
6. fundamental to continuing operations

In the following matrix, these become column and row headings with numbers to create a score. Each item from a risk register is questioned as to its likelihood and then to its impact. It is then given a score from 1 to over 20 by multiplying the number associated with likelihood by the number associated with impact. Having found the score, it is then labelled low, medium or high priority.

Impact \ Likelihood	1 extremely unlikely	2 unlikely	3 moderately likely	4 likely	5 highly likely	6 extremely likely
1 Not critical	1	2	3	4	5	6
2 minor impact in some areas	2	4	6	8	10	12
3 minor impact in many areas	3	6	9	12	15	18
4 significant impact; would not affect continued operations in the short term but might in the long term	4	8	12	16	20	24
5 significant impact in medium term, relates to substantial operational areas	5	10	15	20	25	30
6 fundamental to continuing operations	6	12	18	24	30	36

Priority	
Low	1 to 9
Medium	10 to 19
High	over 20

Sample Analysed Risk Management Plan

Outward Bound Activity Centre Risk Management Plan Update: 10 November 2007

No	Type	Date identified	Date of last update	Description	Notes	Priority	Action	Monitoring Activity	Lead	Timing
1	F, O	12-12-06	10-11-07	Not enough participants	There aren't enough participants to make activities viable; risk of reduced finance and operational failure	H	▪ Create marketing strategy appropriate to target groups ▪ Train activity champions to market for more participants ▪ Modify marketing activity when trends demand	▪ Keep daily attendance figures ▪ Monitor weekly attendance trends ▪ Monitor monthly attendance trends	Activity Leader	Review quarterly
2	O, F, E	12-12-06	16-06-07	Not enough variety of activities	Participants are easily bored, potential of vandalism, word spreads that organisation does not meet needs; risk of operational failure, resource damage, external reputation	M	▪ Establish user groups and regular activity design processes ▪ Establish clear feedback mechanisms ▪ Conduct regular visits to other centres	▪ Keep activity use records ▪ Audit minutes & other records of activity design	Activity Leader	Review half yearly
5	O, E, C	12-12-06	10-11-07	Participant is injured in activity	A participant is injured on climbing equipment; risk to operations, reputation, compliance if Health and Safety mismanaged	H	▪ Ensure daily checks of equipment ▪ Ensure equipment is regularly maintained ▪ Ensure safety training for all users and leaders	▪ Monitor maintenance schedules monthly ▪ Check accident records for trends	Centre Manager	Review monthly
6	O, C, E	12-12-06	10-11-07	Venue is unsafe	Equipment and environment not up to quality; risk of non delivery of activity affecting operations, potential compliance risk and reputation	M	▪ Ensure daily checks of equipment ▪ Ensure equipment is regularly maintained ▪ Establish environmental safety checklist; use at each activity prep ▪ Create alternative venue register	▪ Monitor maintenance schedules monthly ▪ Check safety checklists	Centre Manager	Review Monthly
9	O, C	12-12-06	06-06-07	Volunteers are weak	Volunteers could be ill trained and unprepared, no clear agreements; risk to operations and compliance	M	Establish clear Volunteer recruitment and management plan Establish volunteer groups	▪ Monitor notes from volunteer groups ▪ Monitor volunteer skills	Volun-teers Co-ordinator	Review quarterly
11	F, O	06-05-07	10-11-07	Participants are not aware of range of activities	Activities are not marketed effectively internally and externally; risk of low attendance affecting finance and operations	M	▪ Create marketing strategy appropriate to target groups ▪ Train activity champions to market for more participants	▪ Keep activity use records ▪ Monitor monthly attendance trends	Activity Leader	Review half yearly

Creating a Risk Plan

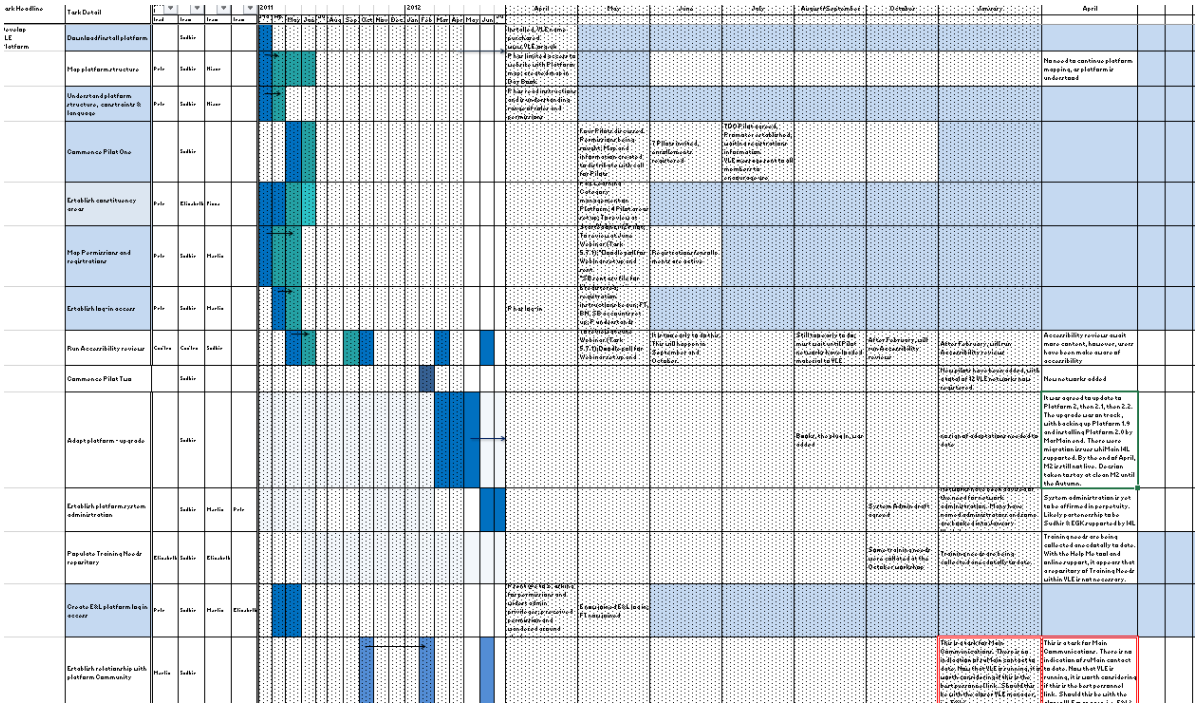
1. Create a spreadsheet laid out like the above chart.
2. Go to any sub-Gantts, working up through the hierarchy of Gantts and look at each task, quickly assessing if a risk is associated with that task.
3. If no risk is identified, move to the next task. If there is a potential risk, copy/paste that task into the risk plan.
4. In the risk plan, change the task language to risk language ('book venue' becomes 'can't book venue')
5. Revisit the context sheet and see if there are any risks
6. Go to through all the risks, fill in brief notes about why the item is a risk, then prioritise.
7. Delete all the low to medium-low risks.
8. Work through the remaining risks in full detail adding the remaining information types shown in the risk plan above
9. Ensure that the final risk plan is linked to the project Gantt, linking each individual risk with the task which gave rise to it.

Section 5: Monitoring

5.1 Project Workbook monitoring

Monitoring is keeping an overview and taking time out of daily project activity to pay attention to the whole project and all its details. How frequently monitoring is done depends entirely on the size and complexity of a project.

At a regular time for each project, open the project workbook for monitoring. One way of keeping track is to fill notes columns at the end of each task link of the Gantt sheets. Enter the date at the top of the first free column, then work down each task area from the overview Gantt, where needed, popping down to a sub Gantt. Likewise, on each sub Gantt, title the next free column with the date. Work through each task and write the minimum necessary to understand the project progress. This will remind you of conversations, emails, and meetings, prompting you to check if you've heard back from a delegated worker or received documents you expected. It may lead you in to project activity, but try to collect actions for after the monitoring process itself. Below, the blue cells indicate complete tasks and the shaded cells indicate time passed.



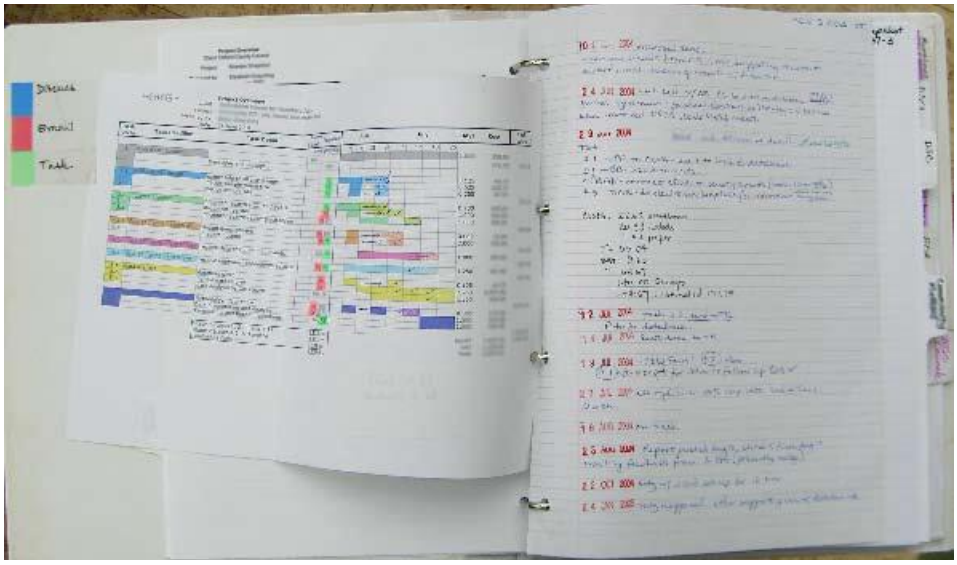
When the monitoring is complete, the workbook should be saved with the monitoring date as a way of keeping clean version control.

A significant benefit of a monitoring method with written text is that each task line becomes not only the task intention (the task language itself), but also the narrative of the task in process. It can prove to be critical project evidence, giving text which can be copy/pasted into reports, newsletters or any other publication.

5.2 Multiple Projects

It is incredibly rare for only one project to be functioning at any given time. Some organisations may have a range of individual projects and even if there is a single project, it is likely to have a number of project areas, each to be managed as if each area were a project on its own.

It is helpful to have a way to look at more than one project at a time. Though it may seem handy to put all project workbooks in one huge workbook, this is unwieldy and may risk corruption of all of them. There are many software programmes in which to compile overview Gantts for quick reference. A hard copy binder is one way to keep project summaries, worked alongside the digital project workbooks. With sections for each project, including a print out of the overview Gantt on the left side, and paper on the right for notes, it becomes an easy reference between projects when one project is opened at a time on a computer.



Notes would include:

- project manager notes of actions
- team member tracking
- notes of times spent
- notes of successes
- notes of resources used
- contact with clients (or others to whom this project is accountable - trustees, funders, committees)
- Slippage, or missed deadlines

Section 6: Reporting & Evaluation

At any stage in a project, we will almost certainly need to tell someone about it. Reporting and Evaluation are as much part of the project as is planning or execution. Indeed, it is the work of the Project Manager to carry the vision and manage the message of any project. The fundamental to make it all a happy task and not a chore, is to set up the frameworks and templates for each at the start of the project, when we have polished off our Gantt. Create electronic folders for reporting forms or evaluation information as soon as we know what is necessary, then link the folders to the Gantt. Then every time evidence is needed, it will be immediately available.

6.1 Reporting

Why is Reporting a Project Manager's task?

⇨ Because a PM manages the messages

The main questions to be addressed in working out how to report are:

- Who is to be reported to?
- What is the best format for the report?
- When is the key timing for reporting?
- Why is any report needed?

Look at the Context work at Section 1. Who are the stakeholders? Who needs to know? What is the best format for the report? How do they need to receive information, in what format and language?

Recognise that different audiences need different formats and timing. It could be that a newsletter update is needed on a quarterly basis. In essence, this is a report and the behaviours around reporting are as relevant to this kind of regular update.

- *At the start of any project,* agree the reporting formats and timing for each report and either collect or create templates for each report. Even if there is no template, a simple document with a project title will take the stress out of creating a report when it is due .

- *During the project,* pull information from the Gantt and associated files and then copy paste the information into the report template. Then, edit it to the report format

Fortunately, the project management tools given in this course will help gather the information needed to report. By revisiting the core Gantt, by writing task line narratives, and by ensuring that key documents generated throughout a project are linked to the project workbook, reports can be easily created any time they are needed.

One useful tip to keep report-backs short and believable is to report **by exception**. This is to report three things – everything is fine, one thing is very good, and one thing is very bad. The exceptions are the good and the poor performance against the neutral rest. To report only the neutral and good suggests too rosy a view; to report only the neutral and bad suggests too sceptical a view. Neutral/good/bad shows balance and may be believed.

6.2 Evaluation

The aim of evaluation is to boost future effectiveness – both ours and the project's or organisation's. Evaluation can help prove a case to organisational decision-makers, funders or project partners for our organisation's future development, for funding or budget allocation evidence and for information for reporting and other news.

It will be important to measure both hard outcomes and soft outcomes, to use formal evaluation language. Hard outcomes are really outputs – a count of things delivered or achieved. Soft outcomes are the anticipated changes – the comparative feeling types of changes.

Some suggestions for generating creative and helpful evaluations include:

- Alone or with others, create a mindmap to portray a success or a failure in the project
- Gather together all the statements about the project's intentions – goal, outcomes, targets
- gather the baseline evidence – the information which showed the project need or demand
- Gather the agreed success measures or create success measures (how will we know and what will we see to know if the project achieved its objectives?)
- Agree data collection tools which are fun and easy to use. Photographic, video and audio recorded evidence is as valid as written or drawn
- Be aware of ethical implications and data protection (GDPR)

Plan to gather evidence at intervals in the project, not just the end. Indeed, evaluation at the end, with no baseline or interim data collection is just a story; it can only tell people's impression of the project's impact. Creating the tools in the beginning will gather real information the whole life of the project.

- *At the start of any project,* Agree outcome statements, gather baseline, and ddesign information collection tools using participatory and classic methods

- *During the project,* collect evidence as creatively and robustly as possible, analyse evidence with groups if possible and record the results in files linked to the Gantt.

- *Use three forms of data collection* to ensure that there is a robust research framework.

For more resources on tools and methods, do an internet search for: "participation research tools". The site, communityplanning.net has good information.

Why is Evaluation a Project Manager's task?

⇨ So the theory behind the Gantt is tested

⇨To gain information for momentum

Section 7: Delegation

Delegation is where the art of people management enters alongside the science of project management. This is real project management – tasks carried out by real human beings, managed by a lead human being. *A task is not delegated until it has been accepted*.

7.1 The Art of Delegation

Delegation is about enabling others to contribute to the outcome of a project. It is entrusting decision making to others. This means that more people than the project manager can act and initiate independently. If something goes wrong, we remain responsible since we are the manager; the trick is to delegate in such a way that things get done but do not go (badly) wrong. Delegation skills are the same when the one who receives a task is a project worker or a company we are contracting.

Project management is as far away from line management as chalk and cheese. Line management exercises authority and enacts appropriate employment law; project management is negotiation. A project manager may not tell someone what to do; they negotiate all the parameters of a task, with any project worker of any hierarchical standing inside or outside the project or organisation, or with any worker who represents a contracted organisation. Good managers know that they delegate to people who know more than they may about tasks to be done, delegating to experts when at all possible, welcoming creative opinions and negotiating agreed solutions.

The objective of delegation

The objective of delegation is to have wide ownership and commitment to the project outcome, allowing decision making and changes which may be needed in the life of the task. With delegation, people have the authority to react to situations without referring back to the project manager at each moment of change. Since delegation is about handing over authority, we cannot *dictate* how a task is to be managed. We negotiate from the beginning of anyone or any organisation taking on a task: agreeing the reporting schedule, the information, availability both sides, and the criteria of success. Only by obtaining both input and agreement can the task truly be owned.

To enable someone else to do a task for a project, we must ensure that:

- they know what the task is about
- they have the authority to achieve it
- they know how to do it

These all depend upon communicating clearly the nature of the task, the extent of discretion, and the sources of relevant information and knowledge.

Information

Projects can only operate successfully if task workers have full and rapid access to relevant information. This means that there must be clear systems to enable the flow of information. This is not just keeping files in a clear way; it includes regular exchanges between project workers and manager and briefings by us on the information we receive in our role as manager.

Effective control
One of the main fears about delegation is that by giving others authority, a manager loses control. The opposite is true. If we work with others to apply the same criteria as we would ourselves, then any worker exercises control on behalf of the whole project. Control is spread out. And since they will witness many more situations over which control may be exercised (we can't be in several places at once) then control is exercised more diversely and more rapidly than we could exercise it by ourselves.

Staggered Development
To understand delegation, we really have to think about people. Delegation isn't an abstract technique, but a growing trusted relationship between individuals or organisations with individual needs. The key is to delegate gradually. If we present a task which is daunting, then the task may not be done, or may not be done well, and people will be severely demotivated. This is especially true in our sector when we might be contracting fledgling organisations who are still learning their own tasks and processes. Instead, we build-up gradually; first a small task leading to a little development, then another small task which builds upon the first; when that is achieved, add another stage; and so on. This is the difference between asking people to scale a sheer wall and providing them with a staircase. Each task delegated should have enough complexity to stretch that person or new company - but only a little.

Fundamentally, we project managers step back from making decisions for people. The whole idea is for people to learn to be encouraged to take over. Unless our solution has significant merits over theirs, we take theirs: it costs us little, yet rewards them much.

Constrained Availability
There is a danger with 'open access' that we become too involved with the task we had hoped to delegate or that we really have not delegated it. It is tempting and feels supportive to say that we are available "24/7", but that means we can never say we're busy on something else. A strategy to avoid this is to formalise conversation timing. Agree, when delegating, when might be good to meet to talk about the task issues. If we are contacted in the intervening time, then we can ask if it can wait until the agreed contact or not. The purpose in constraining our availability is to ensure that we can give 100% of our attention when we meet; if we are constantly interrupted by those for whom we've said we are always available, the reality is that we are rarely available for anyone.

Outcomes and Failure
Of course, we have high standards. When we delegate a job, it doesn't have to be done as well as we could do it, but only as well as necessary. We can't look for what we expect we would do (it is difficult to be objective about that), but rather by fitness for purpose. When we delegate a task, we agree together about the criteria and standards by which the outcome will be judged.

Allow, encourage, enable failure. With appropriate monitoring, we should be able to catch mistakes before they are catastrophic; if not, then the failure is ours. We are the manager, we decided that some person or some contractor could cope, we gave them enough room to slip up, we are at fault. So what do we do about mistakes?

Firstly, we want it fixed. Since the worker or the company made the mistake, it is likely that they will need some help to develop a solution; in fact, the best outcome is that they own the

solution. Once that is dealt with, we work together to understand what happened, attempting to avoid any blame anywhere. For us and for them, we need to ensure that they:

- understand the problem
- feel confident enough to resume
- implement some procedure to prevent recurrence

The safest ethos to cultivate is one where people look for and anticipate mistakes.

What to delegate
There is always the question of what to delegate and what to do ourselves, and we take a long-term view on this.

Tasks in which others have more experience should be delegated to them. This does not mean that we give up responsibility because they are expert, but it means that the default decision should be theirs. To be a good manager though, we should ensure that they spend some time in explaining these decisions to us so that we learn their criteria.

In terms of motivation for a whole team, we distribute the more mundane tasks as evenly as possible; and sprinkle the more exciting ones as widely. In general, but especially with the boring tasks, we should be careful to delegate not only the performance of the task but also its ownership. Task delegation, rather than task assignment, enables innovation. The point we need to get across is that the task may be changed, developed, upgraded, if necessary or desirable. So someone who collates the monthly figures should not feel obliged to blindly type them in every first Monday; but should feel empowered to introduce a more effective reporting format, to use computer software to enhance the data processing, to suggest and implement changes to the task itself.

When all is done by everyone else
Once we have delegated everything, what do we do then?

We monitor, discretely and efficiently. We motivate, inspire, train where we need to, team-build, ensure good organisation, praise, correct carefully and thank people. We thank people again and again; after all, without the them, the outcome for which we are responsible would not have been achieved.

Golden rules:

Connect a person with their success

Disconnect a person from their failure

Allow failure by modelling failure

7.2 Individual Task Delegation

The process of delegation is three parts with the acronym *WDA*. *Write* the information physically in something (email, text, social media link, paper) and send it to the person you want to do the task. Tasks written down become neutral information between parties, helping make information clear, and making discussion easier. Arrange a time for *discussion* on the phone, video call, or in person. Talk through all the task details, dealing with questions, and ensure that what you are asking for is well understood. Ask clearly if what is described is possible (time, expertise, willingness). If no, *accept* the answer and ask the person who they may recommend for the task; this recognises their skills whilst allowing them to bow out. If yes, *accept* happily and feel able to use all the fields of information for further follow up.

The template below can be used to delegate tasks in projects. It can be used with volunteers, staff or contractors. It can be used for task groups - anyone who contributes to a project. The task information comes straight from the Gantt. The form below is seldom used, but the table is a set of fields of information which need to be present in whatever form of communication we use.

To	*To*
From	*Name of task manager*
Reference	*Task code from Gantt, or another project reference*
Date	
Task	*Exact words as Gantt*
Other relevant information	*Anything which will help the task be understood and carried out such as details about where information may be kept, which other people or organisations may be involved, what resources may be available - anything which will add information to the task*
Due Date	*Seldom the due date as on the Gantt to ensure any extra time which may be needed still allows this task to meet the real deadline*
Budget	*The number of days allowed - if costed; any money available for any aspect of the task; the time a person is expected to take (say, 4 hours over two weeks)*
Report to	*The person who has overall responsibility for this task area*
Output	*Description of what the finished task will look like: if a report, how many pages; if a plan, how much detail; if an event, the overall atmosphere, etc*

TIP – the same fields of information can be used to *up-manage.* If you, as a project manager, have been asked to carry out a task or a project and have been given minimum information, these fields will help clarify your work with whomever asked you.

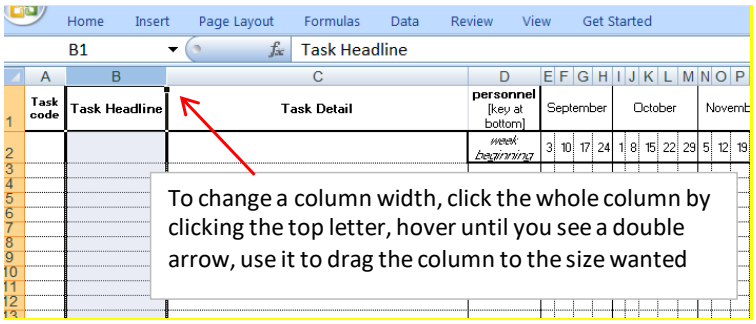
Section 8: Project Workbooks in Excel

You will have been given a populated project workbook within your DSC course time. If you must start from scratch, this section gives you the core information to set up your own Excel workbook. The examples come from Excel on a PC; much is the same on a Mac and where not, the tip is included.

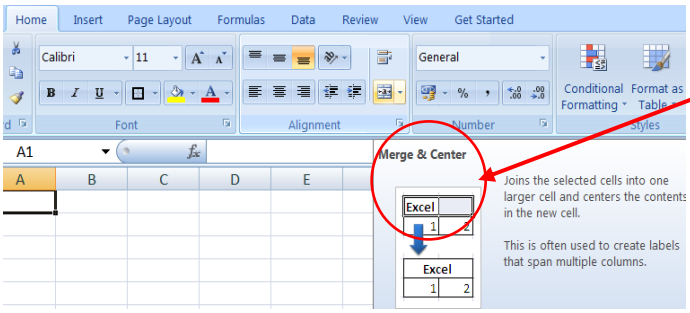
8.1 Setting up from a blank workbook

Set up the first page, the context sheet, as laid out in Section 2 of this course book.

The next few pages will be Gantts.



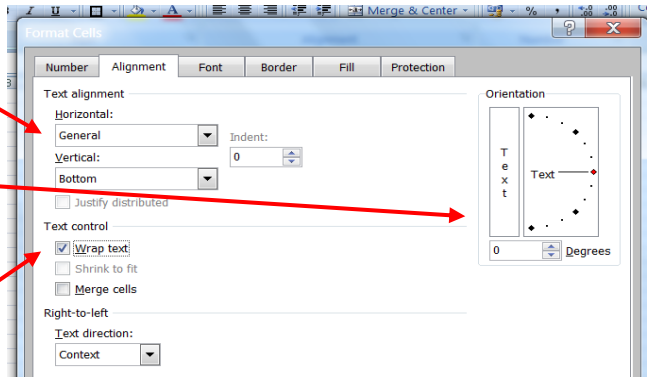
Start the Gantt by filling in the column headings, adjusting the column width as necessary. When working on the dates, start from the smallest period of time (here, the week), add a row above for the next period of time, etc. Then merge the cells across as needed (here, the month cells were merged after the week dates were entered.)



Adjust to the smallest possible column width by highlighting all the columns, hover to find the double arrow, and then double click.

We can choose to centre the words in both the rows (horizontal) and columns (vertical), or even turn them sideways.

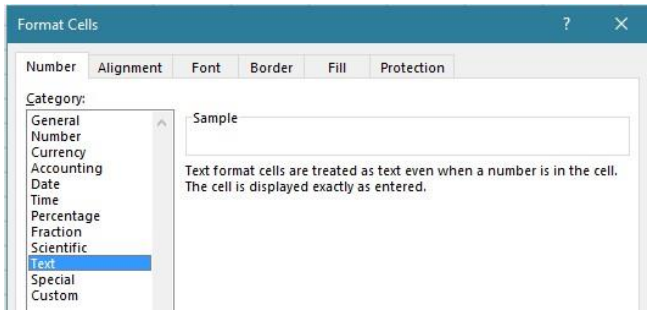
To keep all the words to one cell and retain column width, wrap text.

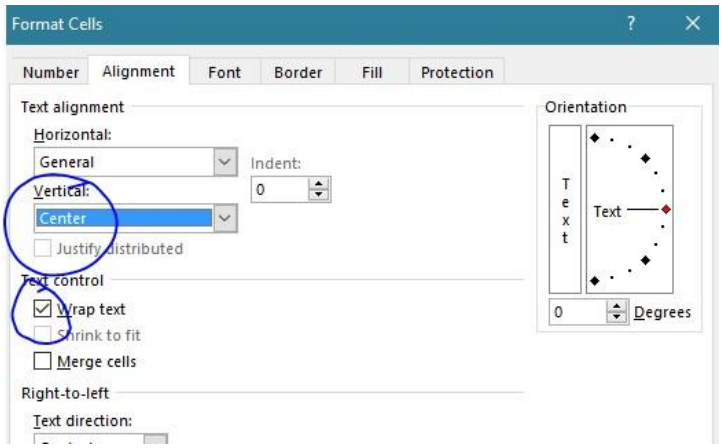


8.2 Formatting with Excel

To get to the formatting palette, click Ctrl 1 or right click>Format cells. On a Mac, use the Formatting palette.

The *first tab* on the formatting pallet should be used to change each worksheet to text, not number, allowing you to enter numbers without Excel then reformatting for accounting.





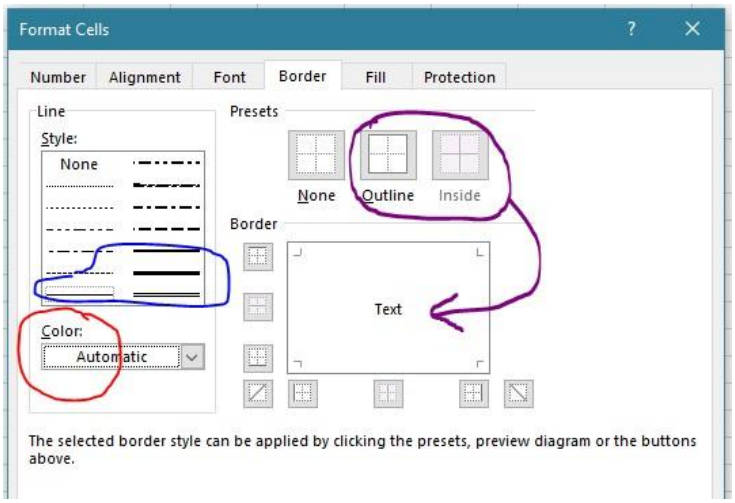
The *second tab* on the formatting palette will let you wrap text so that your words do not run out of your cells. It will also let you choose the vertical alignment, so that your words remain in the centre of rows, whilst remaining to the left of a column.

The *third tab* lets you make a variety of changes to your fonts.

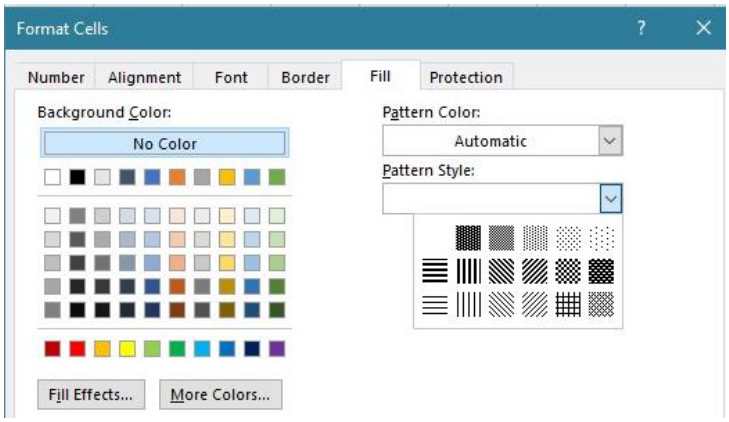
The *fourth tab* is where you can change your borders, a key feature to help visualise a Gantt chart.

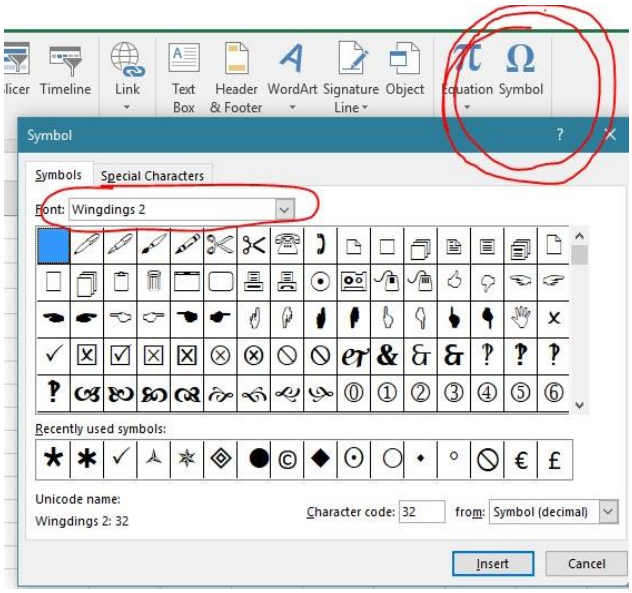
First, choose the colour and thickness of a border.

Then choose where you want the borders by a) clicking on the Preset outline or inside box OR b) by clicking where you want your line in the Border box.

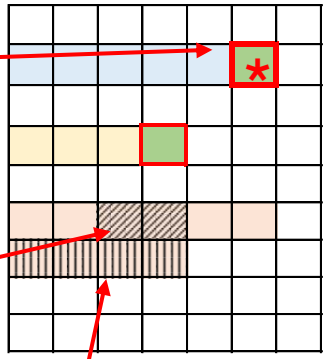


The *fifth tab* lets you change the colour and pattern inside individual cells.



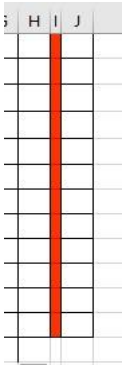


Symbols are found by clicking the Insert tab on the top left of the Excel toolbar, then clicking the Greek Omega letter. This opens a Symbol dialogue box. In the font Window, scroll down to Wingdings 1, 2, or 3 (or any others). There are many symbols to choose for making your own Gantt keys



This is a milestone, shown by using a thick red border and a Wingdings 2 star symbol. It has a dependency in another task area, shown by a thinner red border and both cells use the same colour inside. It is easy to see the milestones and dependencies quickly by the use of colour and border.

The *diagonal* lines, from the pattern style window, are one way to indicate that a task has moved on in time. The straight tightly placed lines are a way to indicate that a task has been deleted. Using patterns to show change allows the original Gantt timing to be seen whilst also showing the changes.



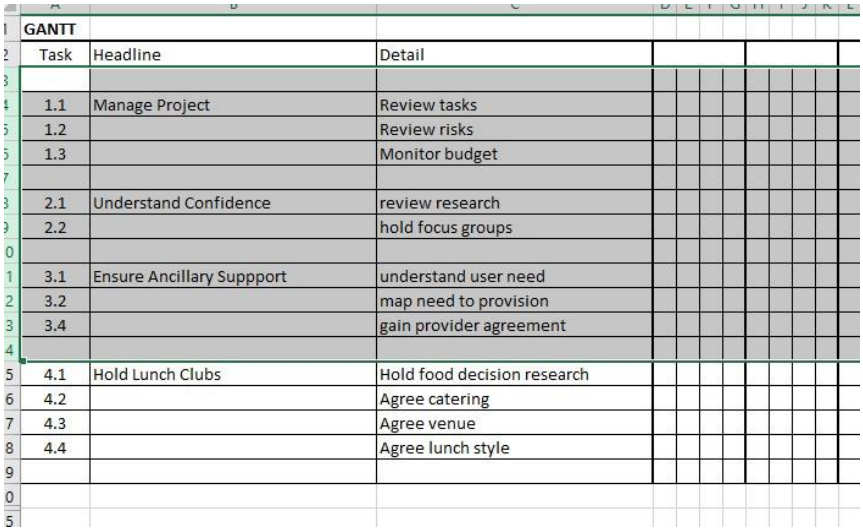
To add a **straight line**, for instance for an Event (deadline) Milestone, add a very narrow column. Highlight the cells in the narrow column which are within your Gantt. Change the border inside margins and the fill colour to be the same colour.

Bullets in Excel:
Enter text in a cell, press ALT and enter ⍰; then:
Press ALT and number 7 (from the numeric keys, not the keys above the keyboard) OR
Select a symbol to use as a bullet (not a * / + - or Excel will interpret them as accounting)

8.3 Creating a Sub Gantt

Select the whole of your overview Gantt (click the top left corner above the row numbers and to the left of the column letters – this will keep your formatting); click copy

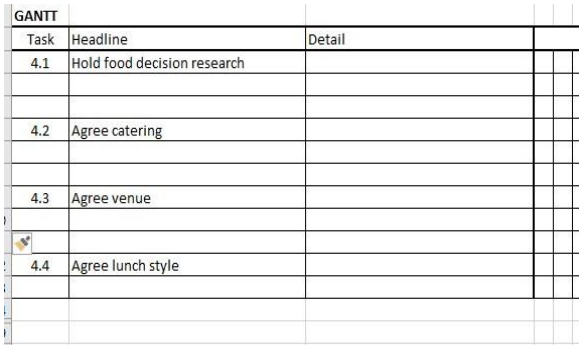
Open a new worksheet, paste the whole overview Gantt



GANTT		
Task	Headline	Detail
1.1	Manage Project	Review tasks
1.2		Review risks
1.3		Monitor budget
2.1	Understand Confidence	review research
2.2		hold focus groups
3.1	Ensure Ancillary Suppport	understand user need
3.2		map need to provision
3.4		gain provider agreement
4.1	Hold Lunch Clubs	Hold food decision research
4.2		Agree catering
4.3		Agree venue
4.4		Agree lunch style

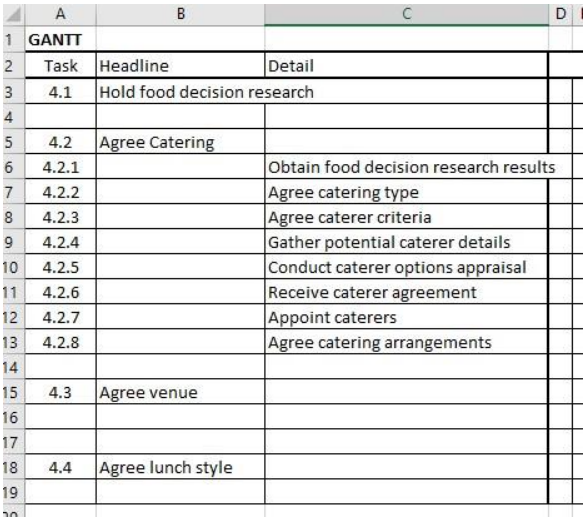
Delete all the tasks (not row headings) which should NOT be in your sub Gantt by highlighting the row numbers at the far left, then right click>delete rows. Name the sheet the title of this sub Gantt task area.

Move the detail tasks into the Headline column (move with a mouse or copy/paste)



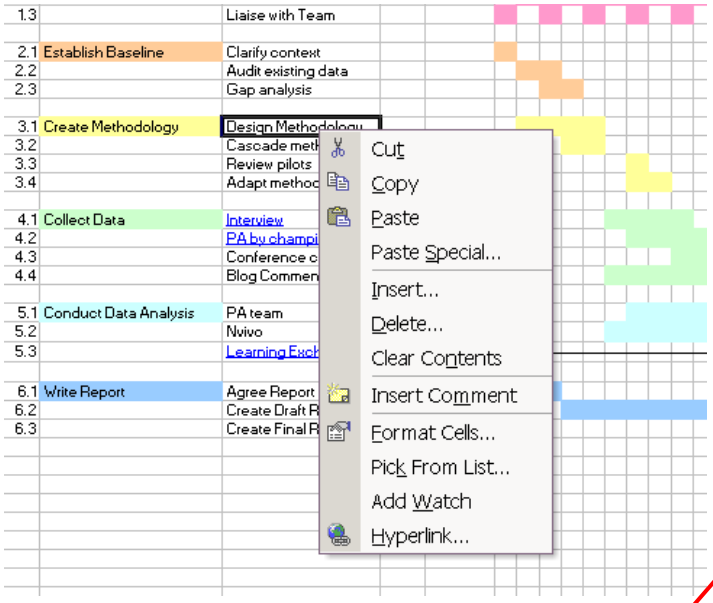
GANTT		
Task	Headline	Detail
4.1	Hold food decision research	
4.2	Agree catering	
4.3	Agree venue	
4.4	Agree lunch style	

Add more lines by right clicking any row number and selecting Insert. Add as many rows as needed for any of the detailed tasks.



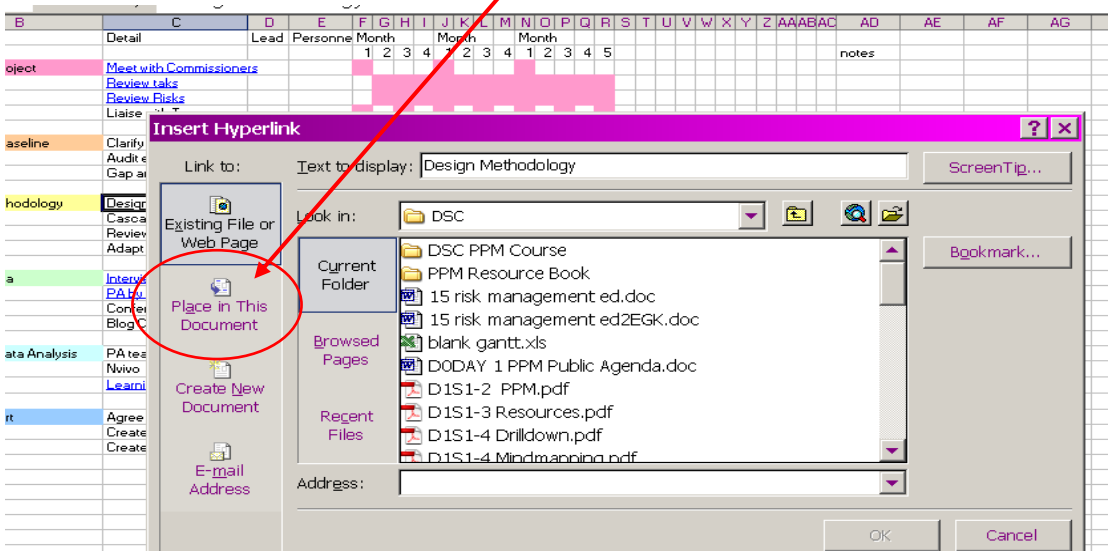
	A	B	C	D
1	GANTT			
2	Task	Headline	Detail	
3	4.1	Hold food decision research		
4				
5	4.2	Agree Catering		
6	4.2.1		Obtain food decision research results	
7	4.2.2		Agree catering type	
8	4.2.3		Agree caterer criteria	
9	4.2.4		Gather potential caterer details	
10	4.2.5		Conduct caterer options appraisal	
11	4.2.6		Receive caterer agreement	
12	4.2.7		Appoint caterers	
13	4.2.8		Agree catering arrangements	
14				
15	4.3	Agree venue		
16				
17				
18	4.4	Agree lunch style		
19				

8.4 Hyperlinks



Use the hyperlink feature to add electronic links to your project workbook. One way to find it is to right click on the cell to which want to add a link. The cell will be highlighted and a drop down menu opens. On this programme, the Hyperlink feature is on the bottom of the menu.

When you click that, an explorer window opens, giving a range of options. To link *within* your workbook, select **Place in This Document.** The central window will show you the worksheet names; select the one you want. If you are linking down to a sub Gantt, ensure that you link back up to the Gantt you came from.

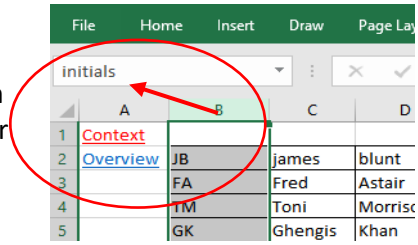


You can also link from your workbook to many places outside of your workbook. The image shows that the **Existing File or Web Page** option was selected. In the window is an explorer box where you can browse to anything in your computer. The Address box at the bottom allows you to link to a Web page. If you use a web hyperlink, your workbook will open the web browser and go directly to the web page.

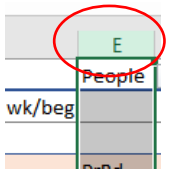
You can connect to email addresses when you click the **E-mail Address** option. Enter the email address in the top box, then you'll see your workbook begin to populate a list in the window. When you click that live link from your workbook, your email programme will open, the email itself will open and you can begin writing directly into it.

8.5 Drop Down Menus

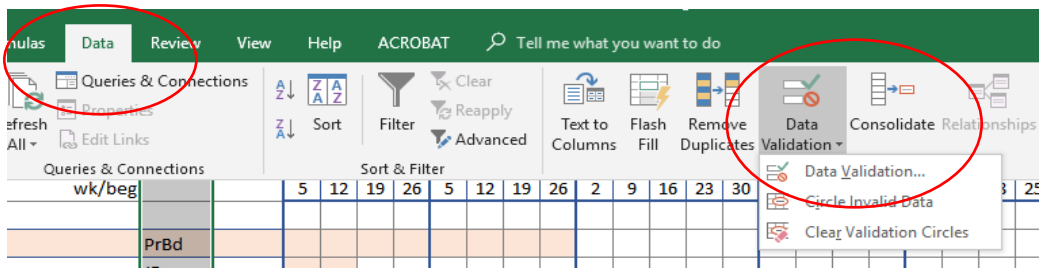
To add a drop down menu, use Excel's Data Validation tool.



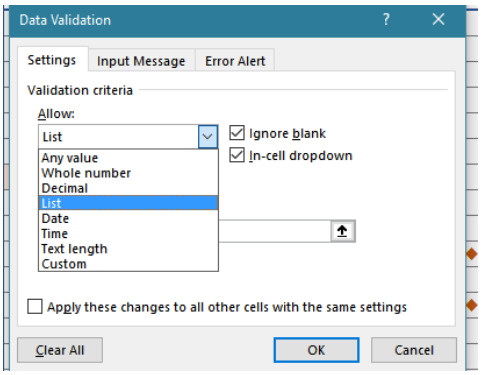
1 First, create your list of names on your People worksheet in your project workbook. Then, click each column from its letter above the column and name the column in the box to the upper left of the worksheet.



2 Then go to your worksheet where you want the menu. In this case, it is the people section of the Gannt. Click the letter above the column titled People.

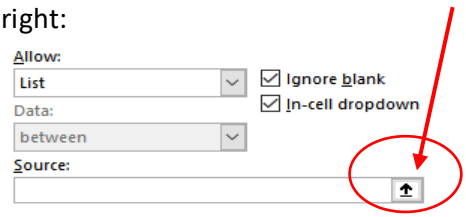


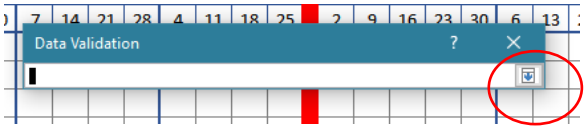
3 Go to the toolbar above and click the word Data. Go to the Data Validation option showing two cells, one with a green tick, the other a red *do not enter* symbol. Cclick the drop down arrow, then choose Date Validation.



4 In the Allow box, click List.

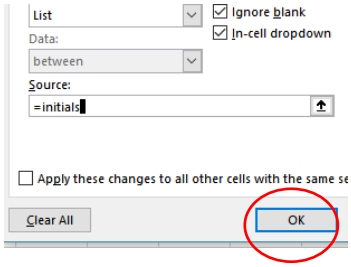
In the Source box, click the arrow to the right:



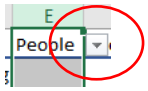


5 When the Data Validation window opens, *go to the worksheet tabs on the bottom of your workbook* and click People. When that worksheet opens, you'll notice that the validation window now shows = *people*. Click the letter at the top of the column of information you want in your menu. In this case, initials. Notice that the Validation box now shows *=initials*. When it does, click the box at the right of the Validation box.

6 You will be taken immediately back to the first Data Validation dialogue box. See that the source box now shows = *initials*. Click OK.



7 Notice that there is now an arrow for a menu beside the People title of your column



Shortcuts in most programmes, especially Excel

KEYSTROKE shortcuts

Ctrl + 1	Displays the formatting dialogue box
Ctrl + A	Selects all
Ctrl + B	Applies Bold
Ctrl + C	Copies to clipboard
Ctrl + F	Displays the find box
Ctrl + I	Applies italics
Ctrl + K	Displays the hyperlink dialogue box
Ctrl + X	Cuts to clipboard
Ctrl + Y	Repeats last immediate command if possible
Ctrl + V	Pastes from clipboard (Ctrl + Alt + V displays the Paste Special dialogue box)
Ctrl + Z	Uses the Undo command to reverse last command or delete last entry

Cmd/alt/enter new line in mac

FUNCTION Key shortcuts

Shift + F11	Inserts a new worksheet
ESC	Removes active dashed line from around selected cells
Ctrl + Shift + spacebar	Selects entire sheet
Tab	Moves to the right of cells in a row
Alt	Displays letters above toolbar tabs; click the letter to the relevant tab which then takes you to the tab's toolbar. Click the letter at the function to display the function dialogue box.
Ctrl + Home	Moves to top left corner of worksheet

Section 9: Organising Hints and Tips

A sobering note – our project will look like us. Organisations get their organisational culture from the very highest levels. So do projects. If we're organised, then our project is more likely to be organised. Good project management tools can help because they:

- stop panic setting in
- save time – for us, for our beneficiaries, for our contact with funders/managers
- help us find important information easily
- help us feel in control – let us know exactly where we are on the progress of any project
- help us not to feel overwhelmed - give us ways to manage what we do as well as all those new ideas

If we regularly use tools – some of those listed below and any other systems which work for us - we will find that we can get stuck into real work around 30 minutes to an hour after arriving at work and we'll need about 20 – 30 minutes at the end of the day to resolve the day. Though this looks like a lot of time, it means that work is more efficient in the middle of the day because we are not staring at paper wondering where it will go, staring at the computer screen wondering what is next, searching the heap to find that important document, glazing over at the 100 emails… etc, etc.

Below are a few tools used by many people for project and general work management.

In tray
Any container we like, marked for other people to know it is our IN tray
Empty each morning – either *do, delegate or defer.*

Out tray
Any container we like, marked for other people to know it is our OUT tray
Empty each evening – file, post, give to delegated recipient, bin (!).

Email
We know what it is….. but it can be managed!

- look at all titles and senders
- delete some without reading
- move some to folders and plan when to deal with them
- read the rest and leave open the ones to deal with – after we've have finished reading them all
- (catastrophic to deal thoroughly with each one as opened) forward or delete the ones we don't personally have to deal with
- go through the open ones one at a time and allocate time for the task they represent; save them as a text file in the task's electronic folder; save any 'magazine' type mailings for a time of the week when we read magazines or keep up to date with networks.

Day Book

- Bound book, or digital equivalent, so pages cannot be removed (keeps chronology)
- date each page
- use for all notes, short minutes, thoughts, phone messages
- Replaces all those little pieces of paper!

Use for all thoughts, workings out, quick telephone scribbles, meeting notes, etc. If necessary, copy any notes into formal telephone notes or meetings notes records.

Project codes

Use codes for work types and parts of work types with the *same code numbers as used on the Gantt.*

Mark on each file, on each piece of paper, on each folder, and all electronic files with same file paths as paper files.

Ideas/Future Projects Book (Folder)

A ring binder (or OneNote/Evernote/software folder) with a section for each new idea:

- each idea for development with any reference notes
- any market research information
- any user demand information and financial consideration.

Use to keep tabs on all those good ideas and to build up a project picture; decide which ones fly by the amount of information accumulated. By the time the funding application or small business plan gets written, there will be a great deal of material to start; for people with lots of ideas, this helps free the mind for other ones!

The bottom line - Touch anything from the IN tray only three times:

1) deal with it
2) defer it
3) delegate it
