



Project Management

A journey worth taking

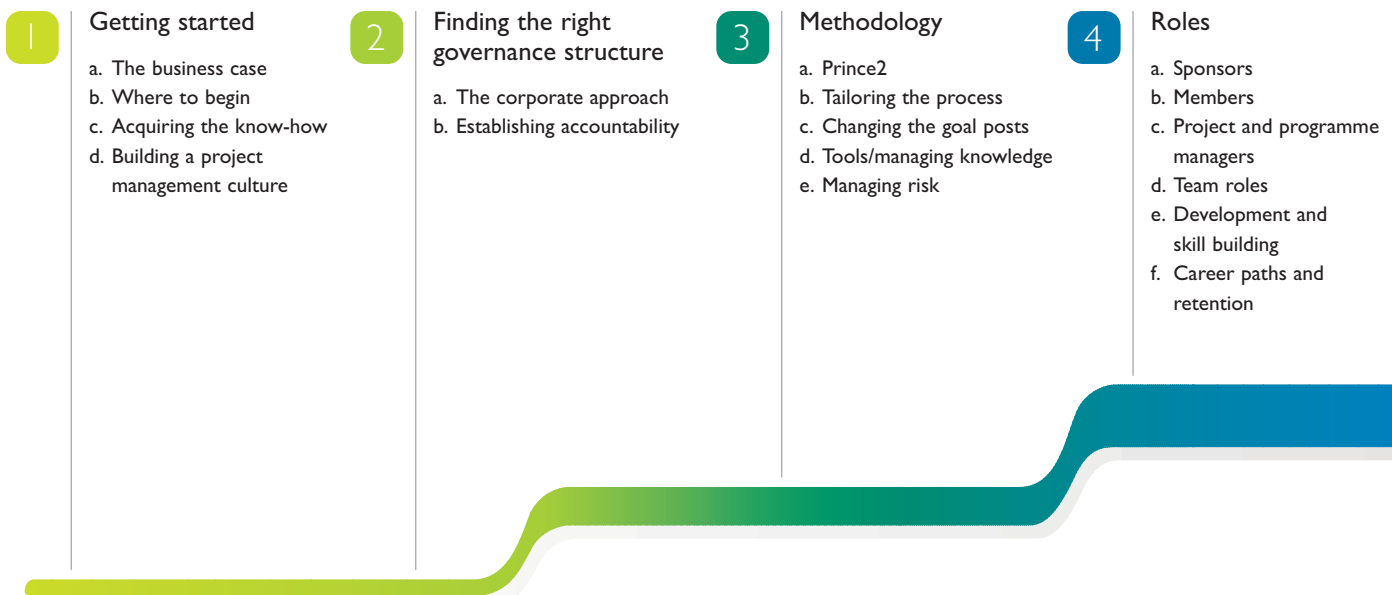
The Project Management Journey

Project management is about initiating change efficiently, on time and within budget and growing numbers of local authorities are reporting benefits such as feeling in control, being able to prioritise initiatives and having early warning of potential problems. Project management moves organisations away from a 'silo' mentality and promotes knowledge sharing and cross-authority working. Roffey Park Institute and SSI Consulting interviewed a range of Project and Programme managers in local government to discuss their approaches to managing projects.

We found broad agreement that:

- Projects are *with* and *for* people, primarily requiring excellent interpersonal skills such as influencing and negotiation
- They should not be *driven* by IT systems and methodologies
- Documentation and methodology should support rather than stifle creativity

The Project Management Journey



We found organisations at various stages of developing methodologies and structures. Some had not begun the journey and had concerns such as:

- How to introduce yet more change with a seemingly high level of bureaucracy
- How to find or develop the skills required to introduce project management
- Whether to take a corporate or a decentralised approach
- What constitutes a project, a programme or a portfolio

There is a perception that project management is still in its infancy in local government and somewhat problematic. It is often considered to be a technical rather than a dynamic interpersonal process, and as a short-term fix rather than requiring an organisational response. However, there are examples of extremely good practice and we asked Cambridgeshire County Council Corporate Project Office, Chester City Council E-Government Project Team and the London Borough of Camden Capital Works Programme to help us learn more about the people implications of introducing project management disciplines. Their experiences are used to illustrate the project management journey.



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Getting Started

THE BUSINESS CASE

Project management is well established in many disciplines where there are complex interdependencies and tangible outcomes such as large construction works or IT systems. Its value is recognised less where outcomes are intangible or relate to services.

The business case for project management is often prompted by Audit Commission CPA assessments or Best Value reviews where there have been recommendations to improve risk assessments or increase accountability. Partnership working, cross-sector alliances and particularly PFI (Private Finance Initiative) schemes increasingly require an understanding of project management to ensure that the parties involved have a common language and are able to monitor and understand progress, costs and delay implications.

WHERE TO BEGIN

Cambridgeshire and Chester advocate first looking at what you have already got in place in order to identify existing good practice, skills and expertise, structures and decision-making bodies that might support project management. Certain professions for example, include project management training and existing initiatives may already be managed as projects or programmes without the labels. Project management might remain as pockets of localised activity or become a way of life.

“We are in the re-use and re-cycle process not the ‘it wasn’t designed by me and I can’t use it’”

Linda Spear, Change for Children Programme Manager, Cambridgeshire

Cambridgeshire County Council have taken a corporate approach. Debbie Bondi, was brought in from the private sector as Head of Business Development, to set up the corporate project office (CPO) but has been able to build on existing good project management practice in several areas, including the Social Services Directorate. With a complete organisational restructuring in the pipeline, she saw an ideal opportunity to work within the pre-established timetable for change and new structure. She believes an understanding of the context and landscape of change is vital.

Her team began by embracing what they could get hold of, aiming to ensure that all projects became part of programmes and that there were no ‘orphan projects’ but knowing that the structure would probably not be right first time. Debbie acknowledges that it wasn’t possible to do all the thinking up front.



“We have to manage expectations and this is just a start. The circumstances may not be perfect and may change but project management is about change not ‘paint by numbers’ ”

Debbie Bondi, Cambridgeshire

There were inevitable decisions to be made about how far to ‘back-track’. Methodology can be introduced retrospectively but judgements have to be made about what documentation to complete. For example, one ongoing piece of work, ‘Improving Financial Management’ benefited substantially from completing a retrospective business case, which provided the criteria to ensure the project was delivering on its objectives. The business case is usually considered the most important document to have.

Chester’s aim, meanwhile, was to bring more discipline to the management of smaller projects and extend risk management techniques to an equal standard across the organisation. The task fell to Mair Houlker, the new E-Government and Technologies Manager who had been a Project Manager for Cheshire Police. While there was no consistent corporate framework or knowledge to support formal project management at Chester, there was a decision-making board, ‘Connecting Chester’, which authorised resources for initiatives. This provided a base on which to build and one of its first projects using a formal methodology was the ‘Project Management Project’ to build capability through development and training.

Following Best Value reviews of its Housing Capital Programme in 2000 and 2002, Camden’s aim is to maintain its ‘excellent’ rating through an integrated programme of service improvement. Their approach has been to systemise and professionalise project management process and practice in order to deliver a consistent, high quality service by increasing project management resources and invest in the training and development of staff.

ACQUIRING THE KNOW-HOW

The know-how to establish project management can be acquired in various ways:

- **Buying in an experienced champion and/or project and programme managers**
- **Internal capacity building using projects as career development opportunities and challenge for high flyers**
- **Sharing learning, networking and benchmarking with other Councils**
- **Use of consultants and contractors**

Firstly, Cambridgeshire, Camden and Chester have each acquired an experienced and inspirational project management champion who has a clear vision of what can be achieved and is empowered by senior level support. Their enthusiasm and energy is infectious. This is important, as one of their key roles is to build support and commitment within the organisation.



“You do need someone that passionately wants it to happen...They don't have to be an expert, they just need a real will to make this happen and see it as important”
Mair Houlker, Chester City

Other roles might be resourced through a combination of recruitment and internal development.

Chester used a combination of ways to acquire know-how but they are keen to acknowledge learning gained from and shared with their neighbours: Crewe and Nantwich Borough Council; Cheshire County Council; Ellesmere Port and Neston Borough Council; Warrington Borough Council and particularly Manchester City Council and South Lakeland District Council through NWeGG (North West E-Government Group).

“We are not a large authority or extravagantly resourced but we benefited immensely from our association with other Authorities. Seeing people in similar situations is helpful. It becomes a self-sustaining community which provides help and inspiration.”

Mair Houlker, Chester City

Chester's willingness to learn from other organisations encourages broader partnering skills. They already collaborate to buy training but the team also has a dream of becoming an accredited training organisation to provide low cost foundation project management training for their partners.

Cambridgeshire take a cautious approach to consultants ensuring that they gain maximum value from their expertise. Their message is not to bring in consultants unless you know how to get value from them and have an exit strategy. While consultants and contractors bring project management expertise to the organisation, they do not necessarily share the same long-term vision and values of the Council and ultimately can take the learning and valuable experience with them when they leave. It is therefore important, to put processes in place to capture and store this learning.

The Cambridgeshire CPO provides training for consultants when necessary on their expectations and are developing a protocol for managing contractors regarding where and when to use their own scarce resources alongside them to ensure knowledge transfer to the organisation. Chester, having limited budget, have benefited from a Consultant to provide support and credibility. They have asked him to do Member and Senior Management Team briefings as well as the all important first few courses for officers.

BUILDING A PROJECT MANAGEMENT CULTURE

The organisational culture has to be conducive to project management. Territorialism, blame culture, lack of human and financial resource and absence of senior level support can all stifle its introduction. Project managers and teams have to be able to work legitimately across functional boundaries, which can initially feel uncomfortable.

“People too often feel employed by the Directorate. Project management breaks down these barriers.”

Tracy Raby, Project Manager, Cambridgeshire

Project management encourages a culture of accountability and empowerment. Where there is a robust plan, the team is trusted to follow that plan, producing brief regular updates unless something goes wrong. At this point they call in senior level assistance. 'Reporting by exception' reduces the pressure on senior level time, ensuring they focus on issues requiring urgent attention while leaving the day-to-day detail to the project teams.

Cambridgeshire County Council recently launched a culture change programme providing fertile ground for project management, which, in future, will be built into the job descriptions of all new managers. They believe that the culture has to be highly tolerant of ambiguity and comfortable at 'keeping balls in the air', recognising that there are no neat solutions in a complex environment.

Even where there is tremendous appetite for continuous improvement it is important to meticulously build internal commitment.

“I spent a lot of time just talking to people in the organisation. The initial buy in and stakeholder management is just vital, particularly if you are going with Prince2 because it does have an image that you have to overcome.”

Mair Houlker, Chester City

The Chester team initially began to use project management methodology as a practical demonstration of good practice. As elsewhere, the results began to speak for themselves when people became interested and convinced of the benefits.



Prince certificate presentations Chester

Chester visibly demonstrates organisational commitment to project management by holding a short ceremony to present certificates to their first cohort of newly qualified practitioners.

Finding the Right Governance Structure

One of the key issues is to determine the scope of the project and programme structure and the important decision as to whether to centralise or decentralise resources. While a project is a discrete piece of work producing an output, a portfolio of projects is planned and managed in a co-ordinated way to produce more complex outcomes.

THE CORPORATE APPROACH

Cambridgeshire's corporate approach is ambitious and means that all senior managers across the Authority are involved, moving project management away from the traditional ICT and procurement led projects to those relating to people. Their CPO has two aims:

- To be a centre of expertise for project and programme management
- To provide business support for grouping projects, putting governance around them and providing methodology, training and consultancy support

They are, however, clear that they do not deliver change single-handedly, as this involves many others, including the business change agents. The centralised structure at Cambridgeshire permits a three level model consisting of individual project boards, programme boards and the Business Support Programme Board (BSPB) which ultimately authorises the go ahead to do a business case for new investment. The BSPB currently governs ten programmes but they are considering options to formalise a governance framework to cover other business change areas. The criteria for defining business change areas are:

- Customer focused
- Supports desired culture
- Derived from corporate strategy
- Clear sponsorship
- Clear objectives
- Coherence
- Silos avoided
- Business change not business as usual
- Success criteria based on benefit realisation
- Not overly bureaucratic

One example of the approach is the decision not to manage the E-Government agenda as a separate change area but rather to embed it in every aspect of change. Debbie Bondi is keen to stress that the structure is not about 'neatness' but about

'engagement' and that structures should be flexible to accommodate new agendas when needed. They are currently looking at a proposal to align projects in four key business change areas centred around customer focus (see opposite page).

The CPO is still grappling with how to include National Programmes requiring local resources into the structure.

ESTABLISHING ACCOUNTABILITY

At Chester, too, they have already begun to realise that there is a natural progression to programme management. They see the advantages of a hierarchy looking to the delivery of benefits and the bigger picture but for a long time struggled to see how their existing decision-making mechanisms would correspond to project and programme management. The Connecting Chester Board currently sits somewhere between the two.

"We are still working on what our programme management structure is. We got diverted into the hierarchy of the organisation but that isn't necessarily going to reflect the programme management hierarchy".

Mair Houlker, Chester City



At this stage, they don't plan to go as far as Cambridgeshire but their aim is to have clear lines of accountability around which programmes can be organised.

One advantage of centralisation is that projects can be prioritised against Council objectives, avoiding local optimisation at the expense of overall aims. In Cambridgeshire, people believe that this encourages more honesty in reporting, as once the plan is set up and agreed by the Board, there is a sense of being able to speak up when they haven't got sufficient resources.

Case Study

Change for Children, Cambridgeshire County Council

The Change for Children Programme responds to the Government agenda to take a child-centred, multi-disciplined approach to all services relating to them. In Cambridgeshire it is being undertaken as part of an ambitious programme called 'Reshaping for Excellence', made up of ten projects, which together will transform the whole organisation. Its aim is not just a new structure but the ensuing benefits of facilitating culture change and customer focus.

The Child Services project was considerably bigger than the others and Linda Spear, the Change for Children Programme Manager, firstly did a scoping exercise to determine whether this was indeed a 'project' or a 'programme'.

It was identified as a programme consisting of six well-defined projects: three of these had a dependency on the main Reshaping for Excellence initiative, requiring a high programme-level relationship between the two programme managers, while the other three were dealing with external partners such as health and Primary Care Trusts. There had to be, therefore, a set of operational activities around the programme and it effectively became a programme within a programme. In order to run it as such, Linda created a top-level programme brief with its own quality plan and below that a set of six project briefs each run by its own project manager. One overall programme plan was created to manage outputs, tasks and the milestones.

There is a key interface project between the Change for Children Programme and the Reshaping Programme called the Organisational Arrangement. This deals with all the internal structures that the Office of Children's Services needs to make sure the integration can be achieved. In some ways it mirrors what is happening nationally but in other ways it is quite unique. Sue Nix leads the Organisational Arrangements project within the programme and her key job is to make sure that whatever

the internal council structures are, any designs agreed with the Children's Services partners are actually feasible and affordable.

In order for the back offices to deliver what the front offices need there had to be change, but within a timescale that allows for the design of a new office structure. The Change for Children programme is therefore carefully phased.

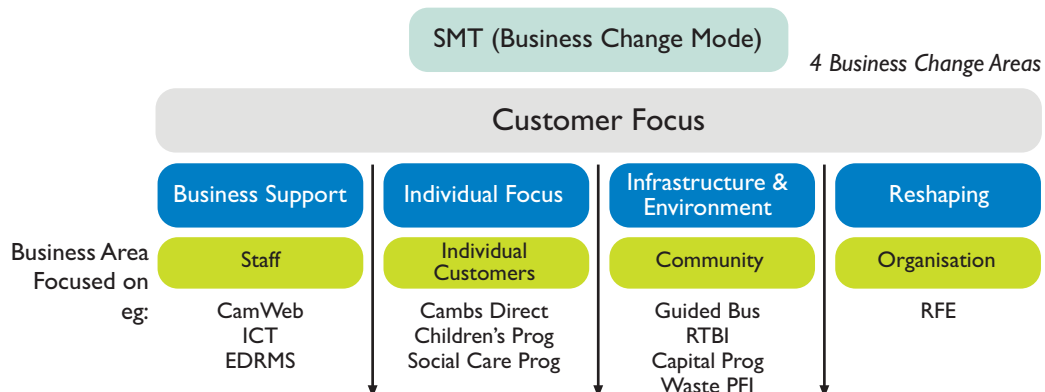
The planning and control around the programme has been to use project management tools pragmatically, design toolkits that facilitate information sharing and to make sure that if there is a good template it is shared and adapted.

The various stakeholders have liked the approach. These include health professionals, educational bodies, Connexions staff, voluntary and other community bodies. They have an experienced Programme Manager and this is important when engaging partners to hand over staff and budget and ultimately co-locate. If they are to provide a multi-disciplinary service they have to feel confident that it will work. Partner agreement has been achieved at every stage.

Members have also had an active role in the Programme. They not only get briefings and papers but have to work alongside the team at stakeholder events and community activities.

The benefit of programme methodology to this ambitious re-organisation is to make it feel achievable. When Linda was brought in to bring shape to the project, her first impression was that it seemed an impossible task. However, by putting in simple milestones for tasks, people began to feel calmer about what they could achieve. She recognises the need to be sensible because, while there are resources allocated to the project, there are people still carrying out their core operational activities. A lot is just good management and communication, to say what will be achieved by when.

Business Change Governance – Proposal



Methodology

Our initial research revealed that Councils take a number of different approaches to project management ranging from common sense and good communication to more systematic methodology supported by technology.

PRINCE2

Prince (PRojects IN a Controlled Environment) is the Office of Government Commerce standard project management tool and is widely used in public and private sectors. Prince methodology provides a common language and creates a set of common standards. Our first phase of research suggested that Prince is often considered too bureaucratic, inflexible and unwieldy for small projects.

Nevertheless, Cambridgeshire, Camden and Chester are all at various stages in using Prince2 methodology. Chester have trained many of their staff in the first stage (foundation level), while all of the Camden Capital Works project staff are working towards the second stage and training to become practitioners. They have each found ways to translate and adapt the methodology to suit their own environment.

TAILORING THE PROCESS

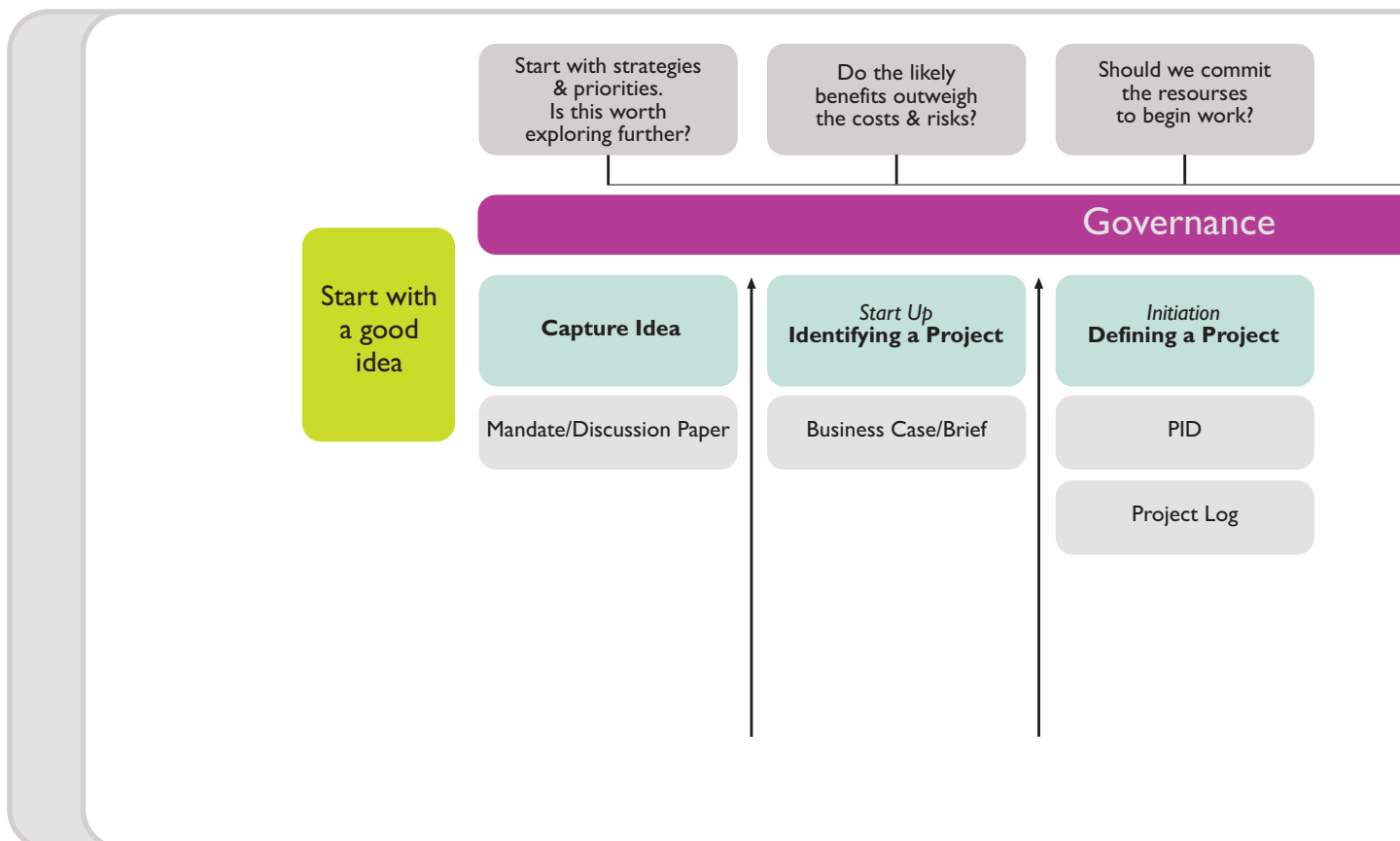
Each Council stresses the importance of tailoring the methodology to suit the organisation and the culture that they are working within.

“The method has to be brought into being by the organisation. Try out methods developed by other Authorities and you'll quickly get a feel for what will work for you. It's like walking around in someone else's clothes, you'll soon see what fits.”

Mike Saville, Project Manager, Chester City

Prince opponents dislike the prospect of additional bureaucracy and 'up front' work but its advocates see it as a flexible tool that can be adapted and interpreted in a way that makes sense to each individual project and is culturally acceptable within the organisation. Many processes used for large-scale projects are often too complex for smaller-scale projects and it is up to the project team to adapt the methodology and select documents that are most relevant to the project.

In Camden, different team members were responsible for leading training sessions on tailoring the methodology. This was seen to be a good way of engaging people in the process, ensuring everyone's involvement in the new way of working and adapting the language in documents and training materials to be user-friendly and intuitive.



“The focus is not on the documents themselves but whether the thinking has been done and whether the right people have been involved.” **Debbie Bondi, Cambridgeshire**

In Cambridgeshire they are keen to point out that the real work is done by the team, with flip charts and post-it notes and warn that it is easy to think you are doing it right because you have a document pile. Methodology is not a substitute for creativity and collaboration.

CHANGING THE GOAL POSTS

A recurrent problem reported about the difficulties of project management in local government is that 'the goal posts keep changing'. This usually means that the scope of a project, previously agreed objectives or some project activities are changed once the resource and time constraints have already been set in project plans.

It is natural that, over time, circumstances or goals may change and projects need to adapt. But this process of change has to take place in a controlled way. Project management provides a protocol, 'Change Control', that helps here. This is a way of systematically assessing the impact of a potential change on the

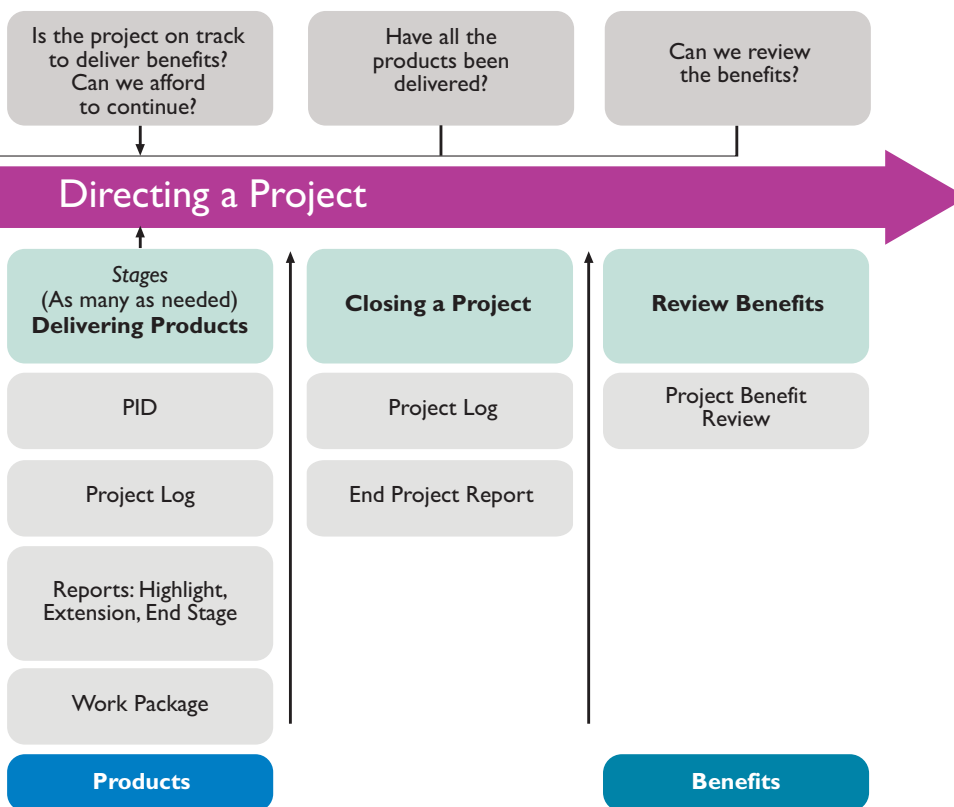
design, stakeholders, skill needs or timescales. In this way, decision-makers can be aware of the implications of a proposed change when they decide whether or not to go ahead with it.

TOOLS/ MANAGING KNOWLEDGE

A key piece of advice from all three Councils is not to rush into buying tools just for the sake of it.

Chester are in the early stages of using project management methodology and have resisted the temptation to mandate particular technologies. They emphasise that project management should not be driven by technology, rather the technology should be used where appropriate to support the way that projects are controlled and managed.

“Use what works for you. It should be product not technology-based. This is a way of behaving and controlling projects. When we understand that as a way of thinking, we will move our focus to supporting it with technology. It could kill it stone dead otherwise.” **Mair Houlker, Chester City**



Cambridgeshire effectively manage their projects through a combination of MS Project and Oracle IT. The systems, together with project management methodology facilitate tracking, chasing and identifying interdependencies with other projects. It is easy to use and easy to train on. The Project Manager is the only one allowed to input but others can monitor time, costs and quality without having to ask for information.

Camden's Capital Works programme is focusing on Prince2 compliance starting with 'configuration management.' This involves bringing all of its project management processes and documentation together in a systemised and centralised procedures manual, accessible as an interactive on-line tool for project teams. There are nearly 60 project management staff and they see consistent practice as key to success. One of the tools they are using to tackle this is a new IT management system, iworld, which will give direct access to a wide range of housing management, finance and property data and incorporate capital programme management data.

Managing knowledge in this way is particularly valuable when teams are working in busy environments, subject to staff turnover and when things go wrong.

“We are not there yet, but anyone now could come into this office and easily pick up all of the information relating to a project.” Pat O’Neil, Programme Manager, Camden

MANAGING RISK

In our first broad sweep of interviews, risk assessment and management was one of the biggest challenges that councils were facing. Linda Spear, Change for Children Programme Manager at Cambridgeshire, believes that project management disciplines have helped them to hone the ability and willingness to manage risk in a more controlled way, while recognising that it is experience that teaches people to deal with it safely.

For example, one of the first steps in the Reshaping for Excellence Programme at Cambridgeshire was to ask Internal Audit to do a risk assessment for the programme. They came back with a range of issues and met with the Programme Board to score the risks on a matrix in terms of likelihood against impact. Having discussed the risk scoring round the table, a line was drawn to indicate the 'appetite for risk'. Specific actions were developed for the risks identified above the 'appetite' threshold. This put the risks in perspective with a range of mitigating activities.

The risks associated with children. However, are qualitatively different to those associated with losing money or staff. While 'Reshaping for Excellence' is about organisational change and structure, the Change for Children programme is about the quality of the relationships they are putting into place. The methodology used to assess the Reshaping for Excellence programme by Internal Audit would not have been good enough for the Change for Children Programme. The experienced programme manager saw this and wrote the quality plan into the programme brief and then asked Internal Audit to work with the team to validate and quality assure the plan. It was then a challenge for everyone to find measures and toolkits to report progress.

Case Study

The Project Management Project at Chester City Council

The 2001 Best Value review of e-gov@Chester identified the need for a substantial programme of change to improve services by using technology and the Connecting Chester programme of projects was set up to deliver this change. However there was no common project management methodology and many of the project managers and decision makers had no training in managing or directing projects and programmes.

When Mair Houlker joined the Council as E-Government and Technologies Manager she took on the task of promoting a more formal approach to project management and developed a business case that was presented in February 2004. Her recommendation was that Chester adopt a tailored version of Prince2 which would provide a common language when working with other organisations using the same framework. Benefits suggested in the business case were:

- **The proper prioritisation and planning of projects in line with resources available to the programme**
- **Reduction in likelihood of waste of resources due to lack of coherent direction**
- **A clear audit trail of decisions made and demonstration of due diligence in allocation of finances**
- **Improved effectiveness of budget control – budget released only when costs and benefits have been identified**
- **Clear expectations of products set out before the initiation of each project, promoting better conformance of delivered products with user requirements and expectations**
- **Effective monitoring of progress so that support and direction can be offered in time to implement solutions**
- **Effective monitoring of risk so that problems can be pre-empted or contingencies put in place**
- **Increase in productivity arising from a common understanding of processes**
- **Improved communication and joint working with many public and private sector organisations**

Project outcomes include:

- **A tailoring workshop for project managers**
- **A short guidance booklet on project management**
- **Prince training - foundation and practitioner level**
- **Training in the tailored method of project management**
- **Member and senior management team briefings in the tailored method**

When complete these will be transferred to HR to administer and become part of the existing Management Development Programme. Throughout, therefore, HR has been an important stakeholder; keen to incorporate soft skills and to identify core competencies for project managers.

As a starting point the project began with simple highlight reporting - a one-pager to focus the project managers' and the Board's mind on the essentials. It used a simple red, amber or green status to indicate whether the project was in trouble, identifying what has been done, how much has been spent and what the timescales are. Only amber or red projects are brought to the Board meeting, capturing something of 'management by exception'.

Another aim of the project is to support the Board in nurturing an enabling environment for project managers. Part of the journey is also to build support in the different Services so that they see the benefits of implementing the tailored method.

In spite of being a technology specialist, Mair is keen that technology does not drive the project. She recognises that there are different levels of maturity in project management and technology should only be mandated once the organisation has achieved a stable level of maturity, otherwise there is a risk that systems drive the process rather than supporting the way people want to work.

Roles

People who join project teams build their own skills and knowledge and can find it excellent career development. It is often a good option for people who are seeking new challenge and may even be part of their personal development planning. Much of the success of these roles depends on how far they are 'stuck on the side of a day job'. Meanwhile temporary contracts, secondments and the use of external consultants in key roles sometimes make it difficult to build organisational capability.

Adrian Dobbyne, programme manager 'Reshaping for Excellence' in Cambridgeshire, believes that time needs to be invested to get the right programme and project managers and sponsors as well as the right Board for each project.

The Chester team believes that there is an important distinction between 'roles' and 'job descriptions'. You can, for example, be a project or a programme manager without having the title. However, people playing these roles do need to have sufficient time to do them properly. Initially very few people in Chester worked as full-time project managers and often the officer responsible for managing a project should have been, in Prince terms, the senior user. In their growing maturity they realised that employing full-time project managers would take the strain off service areas that did not have capacity to provide their own, as well as providing mentors for those new to project management. They have therefore taken on three full-time project managers in the E-Government area.

SPONSORS

Having heavyweight sponsors gives the project weight and status. A project sponsor can be an individual or a sponsoring group. The programme sponsor is ultimately responsible for the programme. The project sponsor's role is to ensure that the programme is focused throughout its life cycle on achieving its objectives and delivering a set of products that will achieve the projected benefits. Throughout the programme the programme sponsors own the business case.

Specific responsibilities of the sponsoring group for the Change for Children programme in Cambridgeshire include:

- **Authorising customer expenditure and setting stage tolerances**
- **Recommending future action on the programme to corporate or programme management if the project tolerance is exceeded**
- **Approving all reports agreed in the quality plan and ensuring that any outstanding issues are documented and passed on to the appropriate body**
- **Approving the sending of the programme closure notification to corporate or programme management**

- **Ensuring that the benefits have been realised by holding a post-project/programme review and forwarding the results of the review to the appropriate stakeholders.**

The programme sponsors are responsible for overall business assurance of the programme so that it remains on target to deliver products that will achieve the expected business benefits, and that the programme will be completed within its agreed tolerances for budget and schedule. If the programme warrants it, the programme sponsors may delegate some responsibility for the business assurance functions.

MEMBERS

Members' roles ranged from needing to be kept informed to active leadership. In all cases people recognised the pressures on their time. Project management disciplines can assist Members to feel more confident about the processes, providing them with headline reports, summary documents and experts who can speak in detail if necessary.

National policy and initiatives like the IDeA's Leadership Academy encourage authorities to emphasise more active involvement. Member development has to balance giving Members an active role in projects with discouraging them from micro-management.

There are very real advantages to active member involvement from the outset of projects. They can:

- **help to identify the principal stakeholders and areas of potential public resistance or concern**
- **promote the benefits of the project, especially where a behaviour change is required among citizens such as waste re-cycling schemes**
- **take considered decisions about the true resource needs of projects**
- **agree to abort projects when it is sensible to do so (that is, to go back on previous decisions).**

Members should be especially involved in those project processes that enhance their community champion role and their role at the interface between the project and the community on whom the project may impact.

In Cambridgeshire's Change for Children Programme, the Members are key stakeholders because they have to make decisions about changes to responsibility in their own areas. The democratic process is important and requires a different set of outputs. It is not just about reporting to Members but inviting them to take responsibility for the next phase of the project. The programme manager has therefore created regular time slots to report on the general progress of the programme, status reports and the programme plan. She has also created an outputs chart based upon the master structure for the Reshaping Programme but added a section that deals with outputs that Members have to achieve by certain dates. Members are not simply signing off budgets but play an important role in managing the whole relationship with health and PCTs. She believes that while the investment in time to educate Members and ensure they are confident is significant in the early stages, it always pays off.

In order to enable active member involvement to take place, senior managers should consider developing a policy of active involvement of members in programme and project work, providing development initiatives that specifically address their role in projects, their training needs and ideas for what is and is not effective involvement.

PROJECT AND PROGRAMME MANAGERS

Ideally a distinction is made between the role of project and programme managers, with each requiring somewhat different skills. Programme managers are responsible for managing change via the stakeholders and have to be able to see the bigger picture and be highly tolerant of ambiguity, project managers meanwhile need to be excellent organisers and 'completer finishers', focusing on the task at hand.

The programme manager is a bridge between the project manager and the business and their role is to ensure that projects work for end-users. They therefore need a strong people focus and understanding of business needs. The programme manager does not necessarily have to be qualified in the programme field. Elisabeth Crowe, a Cambridgeshire programme manager suggests that, while it helps to speak enough of the language if you are, for example, an accountant on a finance project, the tendency for some is to delve into the detail even at work package level. She believes that 'people devolve to fill the lowest gap' and tries to work at the strategic level where possible. Sometimes it helps to be neutral and encourages trust in the project manager who is allowed to do the job without operational interference.

"Programme managers should be similar to a good service department head who understands business needs and says 'no' when it is not a priority." **Elisabeth Crowe, Programme Manager 'Improving Financial Management', Cambridgeshire**

Key skills required by programme managers include:

- Ability to take a macro perspective
- Strong people focus
- Higher degree of budget and programme knowledge
- Prioritising resources
- Adopting a strategic role
- Sound business understanding

Melissa Dillon, Head of Capital Investment, Camden feels that project management is a type of logic and way of working that doesn't come naturally to all staff. To some people it is just common sense but others find it more difficult to grasp.

Key skills required by project managers include:

- Good organisational skills
- Attention to detail
- Open-minded, not closing down options too early
- People skills and communication
- The ability to ask the right questions
- Assertive but quietly confident
- Negotiating skills
- Able to talk to people and engage them in the process
- Ability to take an intelligent approach supported by credibility
- Self and team management
- Ethics, professional identity and accountability

TEAM ROLES

The beauty of well-designed project teams is that no one has to do all the work. It becomes a genuine team effort through the project management disciplines.

MULTI-SKILLED TEAMS

Camden, in particular, highlight the importance of building teams that contain a mixture of staff with specialist and people management skills. Approximately half of the division's project and programme managers are also specialists in different fields such as surveyors and architects. The other half are experienced housing managers and/or people with a background in consultation or community involvement. This ensures that there is a very good level of knowledge in-house and a 'cross-pollination' of people with both technical and people management skills.

“Build up teams of people with lots of different skills – constantly providing expertise and support to one another. Get people working so that they don't just concentrate on their individual projects but they are prepared to support each other.”

Ferenc Moraith, Programme Manager, Camden



Gospel Oak Team with stakeholders, Camden

ALLOCATING WORK PACKAGES

Cambridgeshire allocate work packages to team members. This is essentially a task list so that nothing is missed and breaks down the complexity of the project into manageable pieces of work. The work package, though, is seen as a consultation and team members, who also have 'day jobs', are responsible for flagging up potential time resource and capability issues. People set their own timescales and must challenge unrealistic planning so that it can be picked up early enough in discussion with line managers. Concerns are also documented for future reference.

Chester have introduced work packages that give guidance on quality criteria and use a product description.

“The medium may differ, sometimes it's a conversation, or an email may be more appropriate, perhaps it could be the agenda for a meeting. Whichever method is chosen, we have a way of giving out work that says, 'give me these products' and it will have to fulfil these criteria to be effective”.

Mike Saville, Chester City

DEVELOPMENT AND SKILL-BUILDING

All of the Councils are keen to build internal skills and are currently rolling out different types of training to support programmes and projects. Cambridgeshire select senior project staff according to their management, leadership, negotiation and people skills. As long as people can demonstrate an understanding of project management they teach them the techniques.

In Cambridgeshire most learning is gained 'on the job' with team members being coached and mentored by project managers. Indeed, a well-balanced team can support inexperienced team members in their learning. They are also in the process of setting up e-learning support and have created a project manager Forum, which meets monthly to discuss needs and share learning. Prince and programme management training is provided externally but the Cambridgeshire team also see a need for more work in interpreting and integrating Prince into existing ways of working.

Chester's 'Project Management Project' aims to bring together all of the organisational learning around project management and try to centralise resources and standardise procedure across the entire organisation.



Connecting Chester Board

In Camden, there was some initial resistance to the introduction of Prince training because employees either felt that they were already trained and qualified or were worried about why they were being asked to train and what it might entail. They found that a key way of overcoming some of the uncertainty and fears around this, was to make it clear to staff that all project and programme staff would be taking the training, including the senior management team. Those who have been trained now show a noticeable increase in confidence and a better understanding of their role within the department. This is part of a wider initiative that seeks to provide staff with the 'tools to do the job'.

The Camden Capital Investment team has also been rolling out a 'Leadership in Customer Care' training programme so that staff are effective at dealing with both tenants and leaseholders. The programme has been specifically developed for project managers within the Renewals Department at Camden and seeks to improve: courteousness; timely handling of issues; ability of Housing staff to listen to concerns and complaints; ability to bring about a satisfactory resolution; and where appropriate to offer an acceptable apology. Rather than develop 'instructional training' around customer care, the programme is designed to be more 'developmental and aspirational' and includes role-play training. It aims to promote leadership qualities that will, in turn, improve the quality of the interaction they have with their key stakeholders - tenants, leaseholders, contractors and consultants.

CAREER PATHS AND RETENTION

All of the Councils recognise how difficult it is to actually recruit and retain experienced and competent project managers. As Melissa Dillon says, 'really good project managers don't grow on trees.' She feels that Camden's project management staff are well-trained, have a good reputation and so are targeted by other public and commercial organisations. They are therefore focusing on developing career paths, growing project managers from within the organisation and focusing on other retention methods such as job satisfaction, work-life balance policies and accommodating flexible working.

RE-GRADING

Camden is trying to develop project managers 'from within' and provide a clear career path in order to retain staff. There was originally quite a big leap from project officer to project manager. Managers are now reviewing grades and providing opportunities for staff to develop their professional skills until project officers eventually take on small projects of their own. There are now real opportunities to progress and, in the past year, six project officers have become either acting or permanent project managers.

WORK-LIFE BALANCE

Camden is also keen to accommodate their employees' work-life balance needs and recognise that they need to support a diverse workforce. Flexible working is common, including the compressed working week, job-sharing, nine day fortnight and ad-hoc home-working. The division is particularly pleased that they were able to retain four very good project managers after maternity leave because of the flexibility they offer.

Cambridgeshire support work-life balance by ensuring that no one spends hours on progress reports and are strict on timings of project meetings, which are very focused, although everyone is expected to attend. The work package system encourages individuals to challenge unrealistic planning so that it can be picked up early enough in discussion with line managers. As a result work packages can be split or re-allocated and it is always stressed that it is a 'team effort'.

Stakeholder Management

WHAT IS A STAKEHOLDER?

One of the important benefits of project management is the methodical strategy of communicating and consulting with stakeholders. A 'stakeholder' is anyone who directly or indirectly receives the benefit, or sustains the costs, resulting from the implementation of a project. Identifying and effectively managing stakeholder relationships is critical to successful delivery. A comprehensive map of stakeholders assists in clarifying the desired project outcomes.

Stakeholders might be encouraged to question the outline brief of the project as this helps to gain a picture of those that are either supportive or unsupportive and ultimately identify champions and people who might try to block the project.

“We consider stakeholders to be anyone who can put a spanner in the works”, Tracy Raby, Cambridgeshire

In Cambridgeshire, project teams make a full stakeholder list for every project and develop a strategy within the team for managing the different groups. Stakeholders are grouped according to the type and detail of communication they will need. Some are included in the team or the Project Board, all others are allocated a team member who will liaise with them and manage the relationship.

Investment priorities are used to produce a draft programme for capital investment in Camden. This is taken to consultation bodies: five district management committees, ward managers, resident representatives and they write to each individual tenant organisation, internal clients and district housing management staff to ask for priorities. All comments are taken on board and the programme can be subsequently modified and budget adjusted. The consultation draft then goes to the executive committee.

COMMUNICATION PLAN

A well designed and open communication plan lets people know the frequency and type of communication to expect throughout the life cycle of the project. Camden suggest that it is important to create transparent processes and report progress on a regular basis in order to inspire confidence in clients.

CONSULTATION

A key element of Cambridgeshire's consultation process is the User Forum that engages with and involves clients, and ultimately ensures quality.

Camden has developed a number of tools to help them consult in a meaningful way with customers. As part of the Capital Programme's increased focus on customer care, a 'Pride of Place' consultation toolkit was produced and developed in 2002. The objective of this toolkit is to standardise practice and ensure consistency in consultation for all residents whether tenants or leaseholders. The toolkit has been designed to cater for a diverse group of residents and has been written in nine different languages, audio CD, and large print version.

There is also a user-friendly Leaseholder guide to Capital Works. The Leaseholder Forum has its own dedicated website and the Capital Works programme feeds into that by supplying a five year capital programme and regular updates of progress reports for individual projects, to improve information and to provide an early warning to leaseholders of forthcoming capital works.



Pride of Place toolkit (Camden)



Before and after (Camden)



WORKING TOGETHER

Project managers are often required to work in close partnership with many different groups of people. Camden's Capital projects, for example, necessitate a close working relationship with consultants, contractors, other council departments, the police, the fire brigade, residents' associations and the public. Public meetings are held to get all the issues out in the open well before work starts.

“Successful projects are where people work together and build up relationships – trust is crucial.”

Chris Fallon, Project Manager, Camden

Project managers working on the Capital projects emphasise that day-to-day interaction is important to make sure that issues are not overlooked. They often find that residents' local knowledge is indispensable and regularly saves both time and money. Project managers, consultants and contractors all have to adopt a flexible approach and be prepared to re-work plans. They visit the site three or four times a week, and ensure that they are all giving the same message to residents.

VISUALISING THE FUTURE

The ability to visualise planned changes is an important way of managing stakeholder expectations. Camden's regeneration project photographs and plans are displayed in the site office and are easily accessible in order to alleviate any concerns and engage residents' commitment to the scheme. 'Before and after' photographs are always on display to remind people how the estates were before the changes were made and encourage residents to take responsibility for their upkeep (e.g. locking playgrounds and parks up at night).

MANAGING CONTRACTORS

Camden have designated consultants who attend consultant meetings with project managers to discuss scope/priorities. This produces pre-tender specifications which, once approved by the project manager go out to tender. A consultant contract administrator has day-to-day responsibility for them and ensures they feel part of the team.

“It is about getting the contractors, clients and yourself as the project manager working together as a team. Building up good working relationships between all of you so that if there are any problems or difficulties you can be honest and jointly try to come to solutions.”

Ferenc Moraith, Programme manager, Camden

At the same time, the project manager has to lead the project and ensure that the job gets done. He/she has to ensure there is clarity around the different roles and responsibilities people have.

If contractors are not seen to be working at the standard that project teams expect underperformance is tackled at an early stage. Camden has high expectations around service delivery and is prepared to de-commission consultants that are not doing a good job and pursue contractors for any failures. This sends out a strong message to other contractors that they are not afraid to tackle underperformance.

Key skills for managing contractors:

- Being confident of the role and authoritative
- Understanding of contractor's field
- People skills
- Team-working and coming to honest, joint solutions
- Building trust
- Leading the project, ensuring that things get done
- Good budget and programme monitoring skills
- Being honest, talking to consultants and admitting that you don't and can't know all the answers
- Tackling under performance

Case Study

Clarence Way Estate, Gospel Oak, Camden

Working within the parameters of the procedural framework for the Housing Capital Programme, the Gospel Oak project team have successfully transformed the Clarence Way Estate as part of a regeneration scheme. The success is attributed to the ways in which the project team, contractors and the members of the Tenants' Association have worked together to revive this community. Dialogue and consultation are seen as being a key element in achieving these results and are built into the process.

Anti-social behaviour, drug dealing and street crime used to prevent residents on the Clarence Way Estate from feeling safe in their own neighbourhood. After two years of working on improving the external environment, the children are now able to enjoy the new play areas and the older residents can appreciate a well designed and maintained estate.

Areas on the Estate which required improvement were identified through consultation with the residents and consultants. The nature of the work to be undertaken included redesigning entire areas of the estate to provide safe play areas for the children, changing entrance and exit sites to prevent joy riders from using the estate and providing better street lighting in order to alleviate residents' fears regarding their personal safety.

All members of the community were given the opportunity to participate in recreating the communal space. Children on the estate were engaged in the process by giving them the task of choosing the equipment for the play areas. They were given the opportunity to visit other play parks in the area to help them make their choices. Involving the children in this way has succeeded in giving them ownership of the areas and, it is hoped, they will be more likely to look after and take pride in these play parks.

Communication is seen to be of paramount importance and site meetings, involving all stakeholders, are organised by the project team on a monthly basis. The Chair of the Tenants and Residents' Association is present for part of each site meeting and feeds back information to the rest of the estate through block representatives. Good dialogue between stakeholders is essential and the residents are more likely to accept decisions if they receive a valid explanation from the project team with regard to such issues as planning, funding or legal constraints.

The Project team are based at Gospel Oak and are available on a daily basis to deal with issues as they arise. The team believe in 'walking the job' in order to understand what is needed to improve the quality of life on the Estate. More importantly, they value the importance of local knowledge. Sue Godwin, the project officer, acknowledges that 'you can get caught out on a project if you don't use local knowledge'. Taking local knowledge into account also ensures an efficient use of resources by responding to residents' views as projects develop, reducing the likelihood of having to make changes once the project is complete. As Melissa Dillon, Head of Capital Investment says, 'It's not right if nobody wants it'.

Before and after photographs of Clarence Way Estate are located in the site office and are available for the residents to look at. Visualising the dramatic changes to the Estate is important in acting as a reminder to all stakeholders of what the project is all about.

Building trust and relationships between stakeholders has been a core factor in the success of transforming the estate and once more creating a community. The project team has achieved this by realistically managing the expectations of the residents, but also by ensuring delivery on time and to the required specification.

Evaluation and Learning

In our initial interviews with a range of Councils, learning and evaluation proved to be one of the most difficult areas to crack. While learning logs might encourage people to complete documents, how can organisations ensure that they promote both individual and organisational learning that builds capability for future projects?

EVALUATION

Evaluation relates to identifying the *value* delivered by the project and relies on the clear success criteria established by the business case. Cambridgeshire, Camden and Chester are all at different stages with their project evaluation. In general terms, project evaluation is conducted by:

- Ensuring there is baseline data against which to measure outputs and outcomes
- Being clear on projected benefits (e.g. satisfaction increasing by 10%)
- Following through any benefits that accrue after the end of the project
- Evaluation of broad benefits to the organisation
- Assessing individual outcomes

Evaluation relies on good information gathering techniques. Cambridgeshire's CPO gathers feedback from all stakeholders and the project team has a closure meeting where they consider lessons learned. They examine initial criteria, sign offs, details of variances, the project closure report and deliverables. Outstanding issues are identified with recommendations as to how to take them forward. The final status report is signed off by sponsor, owner and management and archived.

Cambridgeshire emphasise the need to focus on quality assurance throughout the lifecycle of projects. Criteria are established up front and the quality assurance process is documented. Much of this is built into the governance structure where there is a monthly top-level review. The CPO sees it as a big part of their role to ensure continued alignment of projects with corporate objectives.

Camden's Pride of Place consultation toolkit provides a 'now it's over' survey and freepost envelope, providing valuable feedback on satisfaction levels which is fed into performance indicators and on to a scrutiny committee. There is currently not a high response rate to this survey and the division is trying to think of creative ways of encouraging people to fill it in, such as prize draws, door-to-door visits and distribution through the Tenants' Association. They are also looking at the survey design to make it more user-friendly. This is particularly important, as they need representative data to feed back into key performance indicators.

Additionally, Camden hold monthly programme monitoring team meetings at district level to review projects:

“We look to see if projects are performing to time and to cost and to quality - this is a key way of measuring success.”

Melissa Dillon, Camden

Camden also look at complaints statistics and trends and try to make adjustments in terms of performance and complaints.

BENCHMARKING

Camden believe that benchmarking is a key way of evaluating projects. They have joined the 'London Boroughs' Benchmarking Club' originally initiated by the DETR, which measures construction procurement performance across social housing and other public services such as the fire brigade and police service. This is seen to be an extremely useful external performance measure and Camden is currently piloting it using the data from one of their regeneration programmes (Clarence Way). The Benchmarking Club is a group of organisations that share performance data against specific indicators for the purpose of comparing their performance against the overall performance of other club members. Data is recorded on:

- **Consultant performance**
- **Contractor performance**
- **Sub-contractor performance**
- **Our performance**
 - Organisation
 - Team
 - Individual

All teams within Capital Works will be trained on how to use this tool and the data will be fed back into corporate performance indicators. This will eventually enable Camden to benchmark data internally and to see how different teams are doing, identifying gaps and potential remedial measures.

ORGANISATIONAL LEARNING

Our report underlines the conclusion that organisations struggle to capture and store learning. This is in part because projects are temporary organisations. Project structures and project teams quickly dissolve after projects are finished, and individuals often rush off to other projects, for which they are in high demand.

What is needed is:

- **a consideration at the outset of how learning can be encouraged and proposed actions included in the project plan**
- **the setting aside of a small amount of money to support informal learning such as 'project open days' and action learning sets for project managers**
- **sponsors and other senior staff holding project managers to account periodically for what they have learned**
- **using project team awaydays and other development initiatives to encourage 'reflective practice'**

One benefit in Cambridgeshire has been the building up of networks within the council, with staff from various departments increasingly working with and learning from each other. They suggest a multi-pronged approach to evaluation and learning such as the Project Managers' Forum and the production of user guides.

Chester conduct post project reviews where they share lessons learned across their teams. Monthly meetings are also held on the Connecting Chester Board where project managers have the opportunity to question and share information with their colleagues in a supportive environment.

Camden encourage programme managers to run shared learning seminars on a regular basis and current themes include planning and providing training in construction tender evaluation.

We highlighted in section four a range of ways councils are building and developing skills, such as coaching and mentoring on the job, involving inexperienced team members in well-established teams, e-learning support and shared learning seminars.

Most councils, however, are still searching for ways to introduce reflective practices and learning processes so that knowledge is captured and transferred to future projects and their wider organisations.

Checklist

1

Getting started

- Make use of good practice and structures that are already in place
- Examine the organisational culture
- Learn from others
- Find a champion
- Build internal commitment

2

Finding the right governance structure

- Determine the scope of the programme and project structure
- Decide whether to centralise or decentralise resources
- Establish accountability

3

Methodology

- Tailor the process for organisational fit
- Manage knowledge to ensure continuity
- Don't rush into buying tools just for the sake of it
- Make sure that technology is supportive not stifling
- Manage risk throughout the project life cycle

4

Roles

- Invest time in team selection
- Create multi-skilled teams
- Negotiate realistic work packages with team members
- Analyse training needs and fill the 'gaps'
- Ensure Members are clear about the role that they will play and have sufficient information
- Develop retention strategies for project and programme managers

5

Stakeholder management

- Map stakeholders
- Assign stakeholder management to individual team members
- Communicate consistently and create transparent processes
- Manage expectations
- Develop partnership skills

6

Evaluation and learning

- Gather feedback from all stakeholders
- Share lessons learned
- Plan and make recommendations for any outstanding issues
- Build in quality assurance processes
- Consider external benchmarking around specific indicators

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Roffey Park and SSI Consulting offer:

- Project Managers' Workshop (two plus one days)
- Project Managers' Clinic (one day)
- Sponsors' Workshop (one day)
- Healthcheck (diagnostic of the state of programme and project management with feedback and recommendations for the next steps)

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