Training Format

✓Introduction   ✓Learning   ✓Activity   ✓Feedback   ✓Q&A

- We will use breakouts and the chat function to share your work and network virtually

- Slides will be available after the webinar

- Did you receive your worksheet?

Getting the best from today

- Participate – and allow others to do the same

- Keep this as a safe, confidential space to share challenges and ideas for action

- Stay in touch with others and build your support network

- Be courteous to your fellow participants:
    - be on time – especially following breaks
    - ask questions concisely
    - wait your turn to speak and invite contributions from others who are quieter
    - remove distractions
    - use mute when you have background noise near you

Introductions

Introduce yourself in the chat:

- Your name

- Your charity

- What do you want to take away from today?

Hello there.

The Project Management training will cover:

Getting Started: Overview of project management principles and lifecycle

Ideas and Approval: Business case and risk

Define: Realistic expectations

Plan: Structures and finance

Manage: Key tools

Monitor: Reviewing progress

Close: Continuous Improvement

Section 1: Getting Started

What is a Project

How do YOU define a project?

Something with a deadline	A temporary 'peak' in activity changing someone's role or bringing other people in
A distinct piece of work	Activities that are sustained by a particular strand of funding
Something that is a one-off in the calendar	Time-limited activity that will make a change in your charity

What is your project?

Project Life Cycle

The project life cycle describes the stages a project goes through as it progresses from start to finish. A well-defined life cycle brings order and structure to the project.
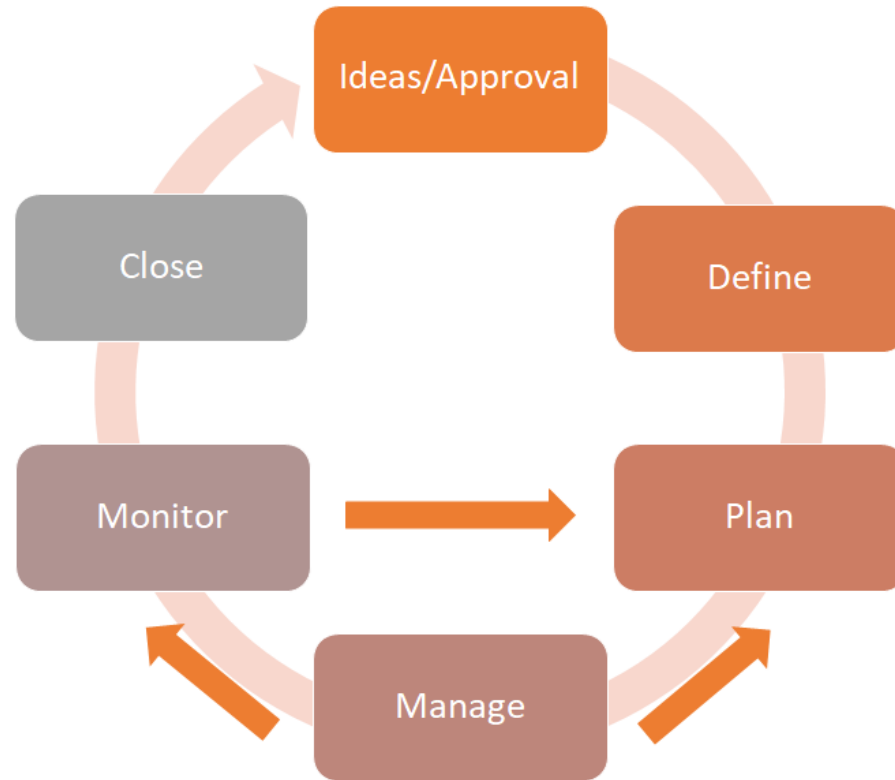
Project Management Principles (the PRINCE2 approach)

- Continued business justification
- Learn from experience
- Defined roles and responsibilities
- Manage by stages
- Manage by exception
- Focus on products
- Tailor to suit the project environment
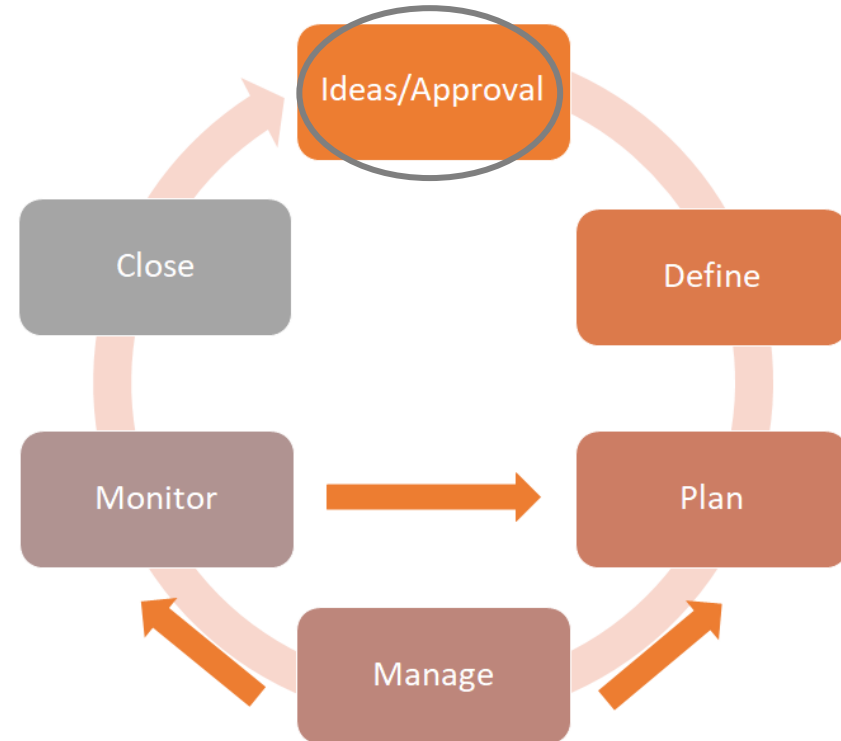
Section 2: Ideas and Approval

- Generating ideas and options
- Developing the business case
- Initial cost benefit analysis
- Initial risk assessment

Generating Ideas:

How did your project idea come about? (Chat Function)

Why have a business case?

Private Sector	Charity Sector
• Is the new activity profitable?	• Will we secure 'return' on this investment?
• Does it fit within current strategies for growth?	• Is this new idea aligned with our mission and vision?
• Can we spare the resources – time, money, other?	• Can we spare the resources – time, money, other?
• Will the shareholders like it?	• Will our Trustees/Beneficiaries like it?

Business Case Content

Used to convince the decision-makers within your organisation that the project is viable, fits in with the overall vision and mission of the organisation, without drowning them in detail.

- Executive Summary
- Reasons
- Options and rationale for choice
- Expected benefits
- Expected negatives
- Timescales
- Costs
- Return on investment (ROI)
- Risks

Exercise 1: Prepare a business case for your project

Project Title:

Executive Summary:

Project Scope:

Reasons: (how does this project fit in with your charity's vision and mission?)

Options & Rationale (what are the different ways of approaching the project? Which of these has been selected, and why?)

Expected Benefits (+ive)

Expected Negatives (-ive)

Timescales

Cost & Return on Investment (ROI)

Lessons Learned (from previous similar projects)

Ultimate Deadline:

Project Title: *Example – Project Peacock*

Project Scope: Increase skills/knowledge/confidence of charities through training

Executive Summary: Deliver current training places to small charities during Covid-19 lockdown

Reasons: (how does this project fit in with your charity's vision and mission?) Meets core mission & objectives

Options & Rationale (what are the different ways of approaching the project? Which of these has been selected, and why?)
Deliver 90-minute webinars
Extend 90-minute webinars to half day
Convert to full day webinar – extended learning, re-use in future (improve access)
Cancel

Expected Benefits (+ive) Fulfil mission / Investment in resource to use again / increase options for delivery / future-proofing

Expected Negatives (-ive) Significant investment in developing content / cost of new tech / training time for trainers

Timescales 3 weeks

Cost & Return on Investment (ROI) £xxx 3 additional licenses / 20+ hours per 4 courses / 2hr x train trainer

Lessons Learned (from previous similar projects) Zoom Meeting vs. Webinar format, Comfort breaks, different speaker / mixed media / activities

Ultimate Deadline: 30/09/2022

Identifying Risks

Exercise 2: Identify Risks to Your Project (Risk Worksheet)

Complete the first column of the worksheet by identifying potential risks to your chosen project.

Example

Risks	Assessment L/M/H (Impact/ Probability)	Mitigating Actions
Low take-up of delegate places		

DON'T FORGET!

Your business case remains the document which justifies all the resources that go into your project from staff time to cash. It needs to be maintained and updated with current information about costs, risks and benefits.

Your project plan should include a review of the business case and you should be realistic about the future of the project – does the ROI still make it viable?

Assessing Risk – Likelihood and Impact

Exercise 2: Assessing the Risk (continued)

Using the table provided, assess the probability and impact of the risks you have identified and add to the Risk Worksheet.

		Impact				
		Trivial	**Minor**	**Moderate**	**Major**	**Extreme**
Probability	**Rare**	Low	Low	Low	Medium	Medium
	Unlikely	Low	Low	Medium	Medium	Medium
	Moderate	Low	Medium	Medium	Medium	High
	Likely	Medium	Medium	Medium	High	High
	Very likely	Medium	Medium	High	High	High

Example

Risks	Assessment L/M/H (Impact x Probability)	Mitigating Actions	Assessment L/M/H (Impact x Probability)
Low take-up of delegate places	**Probability:** *Likely* **Impact:** *Major* **HIGH**		

Managing and Mitigating Actions

Exercise 2: Mitigating the Risk (continued)

4 Ts	Threats	Opportunities
Terminate	Avoid	Exploit
Treat	Reduce (probability or impact)	Enhance
Transfer	Share	
Tolerate	Accept	Reject

Risks can be avoided, reduced, shared if possible – or you are able to accept that the risk is there without taking action to avoid it.

You can also look at opportunities in the same way but instead you have the option to exploit, enhance, share and reject.

Example

Risks	Assessment L/M/H (Impact x Probability)	Mitigating Actions	Assessment L/M/H (Impact x Probability)
Low take-up of delegate places	**Probability:** *Likely* **Impact:** *Major* **HIGH**	**(Treat)** *Reduce Probability by investing in marketing and subsidising*	**Probability:** *Unlikely* **Impact:** *Major* **MEDIUM**

Section 3: Define

**S e t t i n g   R e a l i s t i c   E x p e c t a t i o n s
t h r o u g h   a i m s   a n d   o b j e c t i v e s**

- Overall aim may be general, but your objective should be SMART
- Your aims and objectives are what you plan to achieve – i.e. your goals
- You should have one key outcome per objective
- Aim for no more than eight overall objectives – fewer if possible
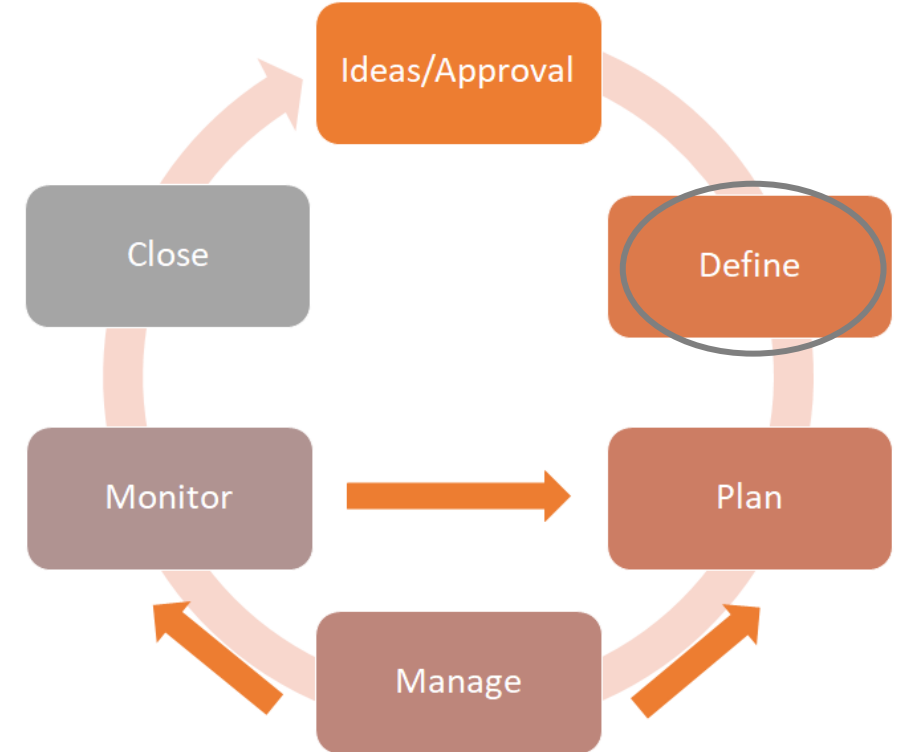
TIP: When formulating your objectives, use verbs

Setting SMART Objectives

S · Specific: State exactly what you want to accomplish (What? Where? Why)

M · Measureable: How will you demonstrate and evaluate the extent to which the goal has been met?

A · Accountable: Who will be involved? How is it aligned to the charity's objectives?

R · Realistic: Is this actually possible given constraints of time, cost and quality?

T · Timebound – Set one or more target dates, the 'by when' to guide your goal to successful and timely completion (e.g. deadlines, dates, frequency)

Exercise 3: Aims & Objectives

Identify the **overall aim** of the project and **at least three** objectives

Example

Aim: FSI Digital Fundraising Conference 2022

- Objective 1. Plan and deliver a fundraising conference with 5+ speakers by June 2022
- Objective 2. Secure at least 200 booked delegate places at the conference by week before the event
- Objective 3. Receive 2+ press mentions between April – June 2022
- Objective 4. Achieve 90% of delegates reporting increase in knowledge in fundraising topics after attendance

Timetable (Skeleton)

Having identified the objectives of your project, you should prepare a project timeline showing a feasible schedule of key activities and milestones. It can be easier to work backwards from your deadline/event. This should only be a very high-level timetable, the detailed planning will come later.

A FEASIBLE schedule of activity showing

- Key activities
- Milestones

January 2022	February 2022	March 2022
Funding announced	Initial research and consultation	Further research and application drafted
Project team assembled	Criteria announced and applications opened	Review and amendments
Activity outlined in diary		Application deadline

Exercise 4: Timetable (Skeleton)

- Produce a rough outline of the timeline for your project (often useful to start from the end point and work backwards)

Project Brief

Already covered:

- Aims and Objectives – i.e. fits in with the vision and mission of the charity
- Risk – what are the risks associated with the project.
- Timescale

Other areas that should also be considered at this point are:

- Technical capability
- Budget
- Legality

Developing your Project Team

This diagram draws from the PRINCE2 MODEL

redefining the roles as follows:
- Business (Charity)
- Users (Beneficiaries)
- Suppliers (Donors)

▪ When thinking about your project it is clear that the charity will play a key role, but it is also be wise to consider how the project will require the involvement of beneficiaries and funders, or indeed any other stakeholder group.
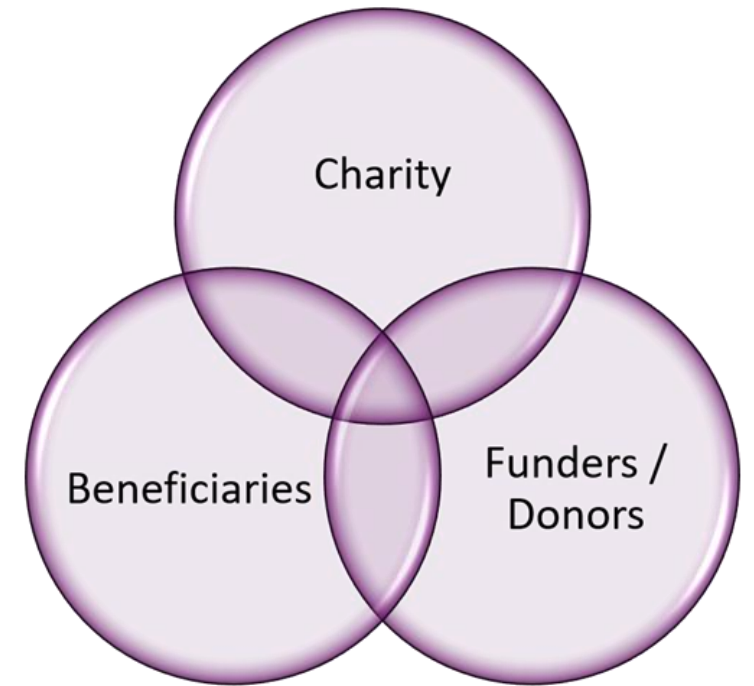
Exercise 5: Roles & Responsibilities

Complete the first two columns – Who are the people involved in the delivery of your project

Name	Job Title	Project Role(s)
Stuart Thomason	CEO	
Alice C	Project Officer	
Deborah A	Associate Trainer	
Matt S	IT Provider Account Manager	

Roles & Responsibilities

- **R**esponsible

- **A**ccountable/Authorise

- **S**upport

- **C**onsult

- **I**nform

The RASCI matrix is a project management tool which helps to clarify the roles and responsibilities of different people in project management structures. RASCI is an acronym derived from the five key criteria most typically used: Responsible, Accountable/Authorise, Supporting, Consulted and Informed

Responsible	Accountable	Supportive	Consulted	Informed

RASCI Responsibility Assignment Template

R	A	S	C	I

TIP

Roles do not have to be aligned to seniority within any permanent structure – a Project Manager could be 'managing' someone more senior to them in the organisation and delegating work to them, for example

Exercise 6: Who's Who (Breakout)

Case Studies

Look at each of the case studies and for each of these projects identify which individual should be in the roles specified on the sheet.

Case Study 1: Capital Project

- Identify RASCI in this case study.
- How can Jonathan support the project?
- Should Bubbles Ltd and the local construction company be involved?

Case Study 2: Big Lottery

- What is Dave's role in this?
- Who is the Project Manager?
- What should Tracy contribute?
- Who else should be involved?

Case Study 3: Website

- What role should each of the 'Heads of' take?
- Who is missing from the scenario?
- Where does VistaWeb fit in?
- Should Social Platform be in the picture if they are the old supplier?

Exercise 5: Roles & Responsibilities (cont'd)

Complete the final column

Name	Job Title	Project Role(s)
Stuart Thomason	CEO	Accountable
Alice C	Project Officer	Responsible
Deborah A	Associate Trainer	Support / consult
Matt S	IT Provider Account Manager	Consult / Inform

Alternative Format:

| Responsible	Accountable	Supportive	Consulted	Informed
Project Officer	**CEO**	**FSI Team Members**	**Delegates IT Provider**	**Trustees Sponsors**

Exercise 7: What makes a good project manager? (Chat function)

- Organised
- Communicator
- Strong leadership
- Enthusiastic
- Flexible
- Solution focused
- Organiser – organised
- Methodical
- Knowledge
- Approachable
- Understanding of the system
- Charismatic
- Assertive
- Visionary
- Ability to foster good relationships
- Committed willing to research what they don't know
- Team player passionate
- Good listener
- Problem solving
- Patient
- Time management
- Diplomatic

What makes a good project manager?

- **Effective communication skills** (The project manager must clearly explain the project goals as well as each member's tasks, responsibilities, expectations and feedback.)

- **Good decision maker** (An effective project manager needs to have decision-making skills because there will always be decisions that need to be acted on.)

- **Cool under pressure** (It is essential that a project manager keeps calm at all times, and is consistently grounded – so as not to 'lose themselves' and adversely affect their relationship with the team.)
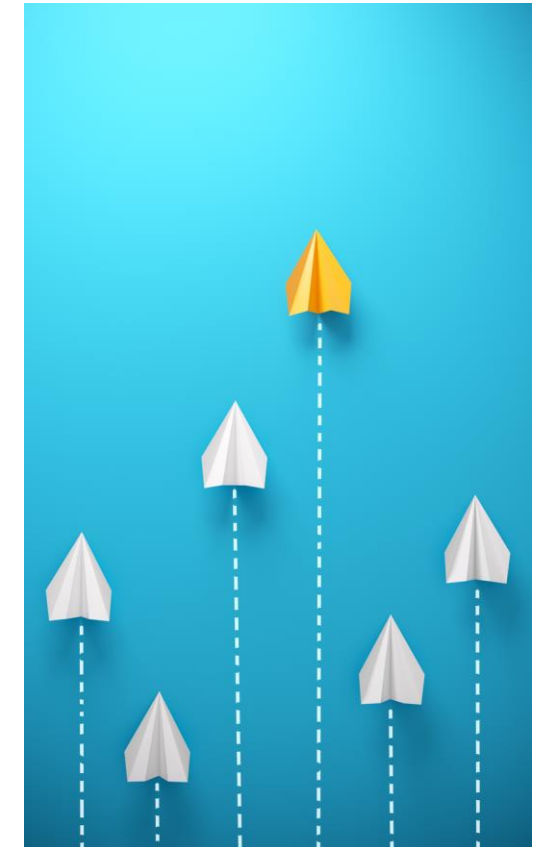
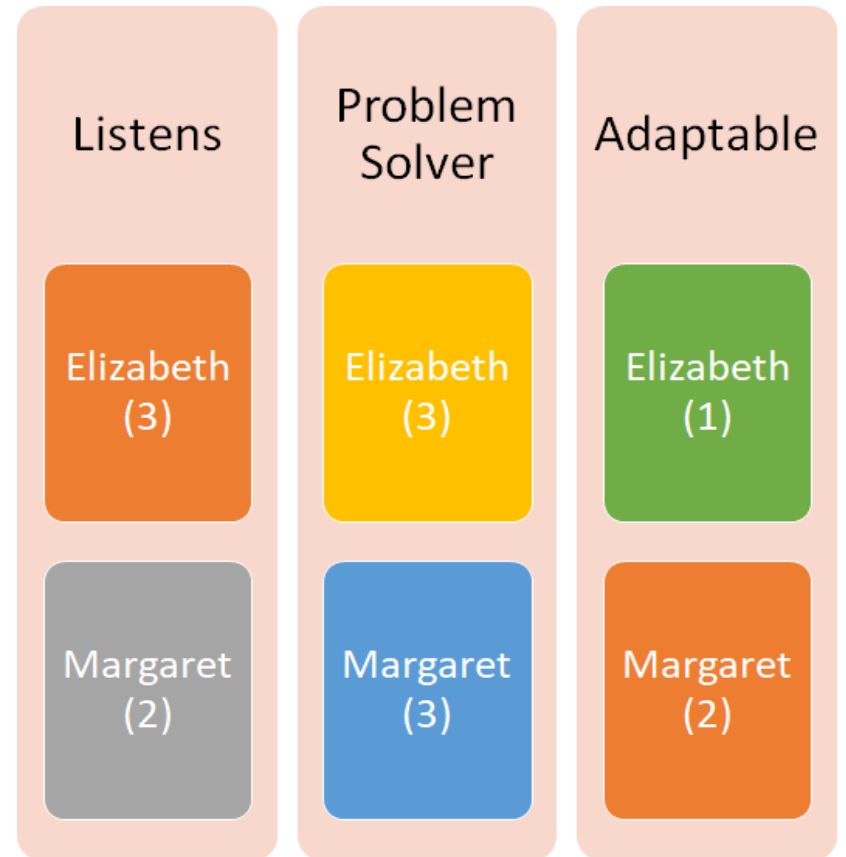| Listens	Problem Solver	Knowledgeable (Project & Sector)	Motivating
Resourceful	Adaptable	Leader	Enthusiastic

Assembling Your Project Team

A Skills Matrix is a visual tool that helps you to clearly see the skills and competencies of individuals within a project team. The matrix is generally used for small groups of people but can be expanded.

- **Skills & Experience**: Consider what skills, experience, capacity and individual strengths/working styles you want/need within the team

- **Fill the gaps:** You could use a matrix approach to focus on **skills** needed and any gaps

- **Clear roles specifications:** It is essential to know who is responsible for each part of the project and that there are clear lines of authority and tolerances

Listens	Problem Solver	Adaptable
Elizabeth (3)	Elizabeth (3)	Elizabeth (1)
Margaret (2)	Margaret (3)	Margaret (2)

Section 4: Plan

Background

- Quality: Plan for quality by ensuring work breakdown structures, performance indicators and specifying tasks.

- Cost: Plan costs by having accurate budgets e.g. estimates and quotes, and by building in contingency

- Time: Plan for contingencies, be aware of interdependencies, estimate max, min and optimum timescales. Ensure all project team and suppliers are aware of deadlines.
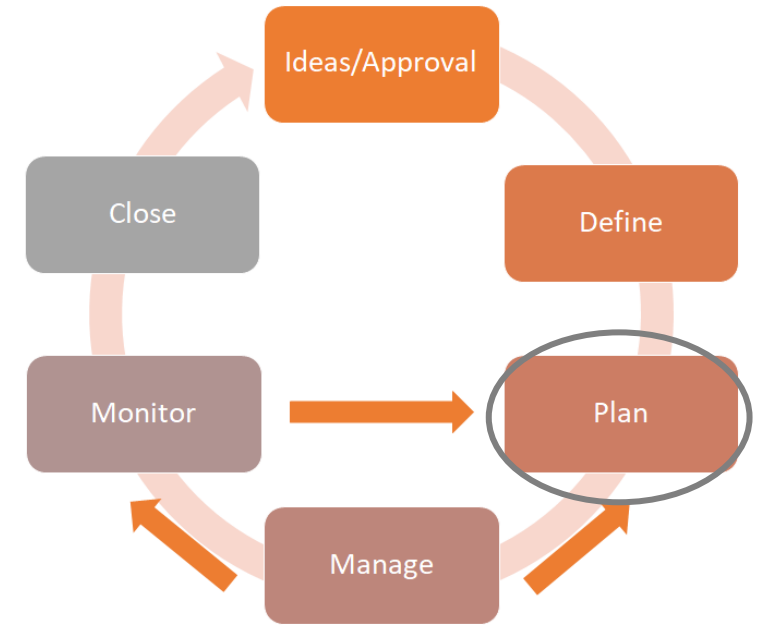
Structure 1 – Project or Work Breakdown Structure

The first planning action is to break down your project into its component parts. Once you know what needs to be done, you can start to plan who does it and by when.
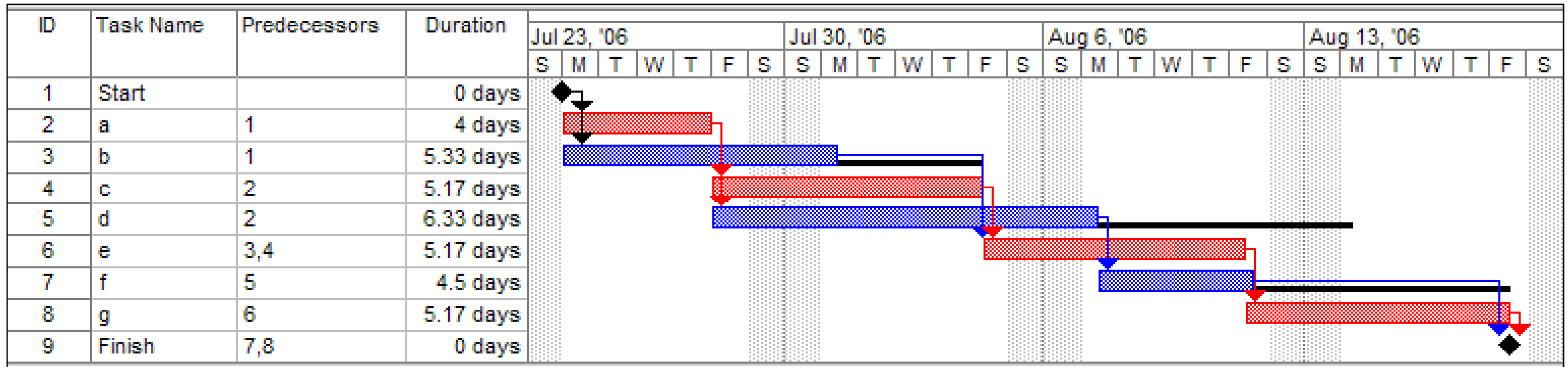
Exercise 7: Project Breakdown

1. Using your own project consider all of the things that need to be in place by the deadline.

2. Group/Categorise defined sections of the overall project

3. Under each group/category identify key areas/actions
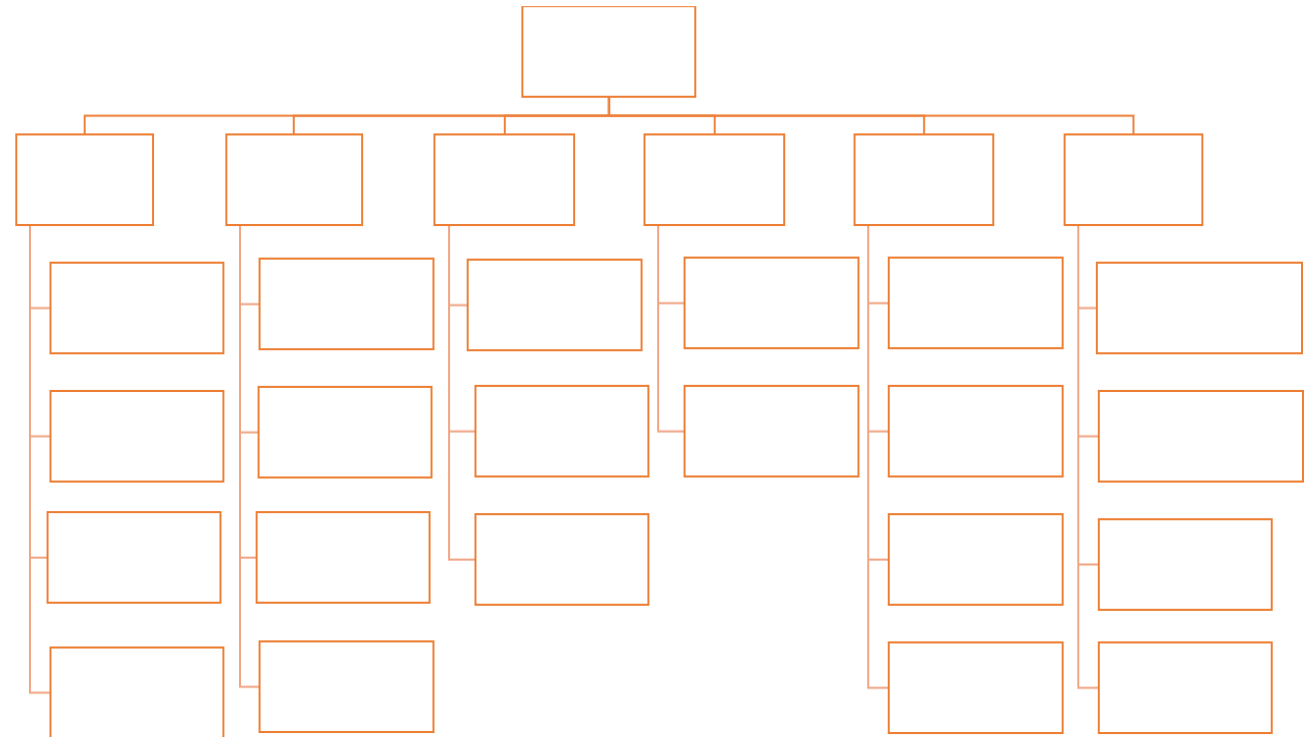
Critical Paths

- Breaks the work down by task duration
- Puts a timeframe on the shortest possible time the work can be achieved
- Highlights where any delay will affect the whole project
- All other tasks are 'non-critical' as they have a certain amount of flexibility in their schedule

ID	Task Name	Predecessors	Duration
1	Start		0 days
2	a	1	4 days
3	b	1	5.33 days
4	c	2	5.17 days
5	d	2	6.33 days
6	e	3,4	5.17 days
7	f	5	4.5 days
8	g	6	5.17 days
9	Finish	7,8	0 days

Work Breakdown Structure – Next Steps

Using the output from the work breakdown structure you can begin to understand which tasks and responsibilities can be allocated to individuals.

Example 1

CEO	Project Officer	Trustees
Publicity	Project Planning	Speakers
	Venue	
	Attendees	
	Delegate Handouts	

Work Breakdown Structure – Next Steps

Example 2

| Project Lead	Support Worker	Expert Volunteer	Admin Volunteer
Project Design & Planning	Deliver 1:1 sessions	Deliver mentoring sessions	Support workshops admin
Gather and Monitor data	Write support plans	Deliver group workshops	Project Marketing
Impact Reporting & Evaluation	Ongoing practical support		
Funder liaison	Organise mentoring programme		
Budget reviews			

Gantt Charts

The second planning action is to define deadlines and resources of the component parts.

Dependencies

This example does not tell us: Who is going to make sure each thing is done, When each thing needs to be done, What can't be done before something else – i.e. an action is dependent on another action taking place first.
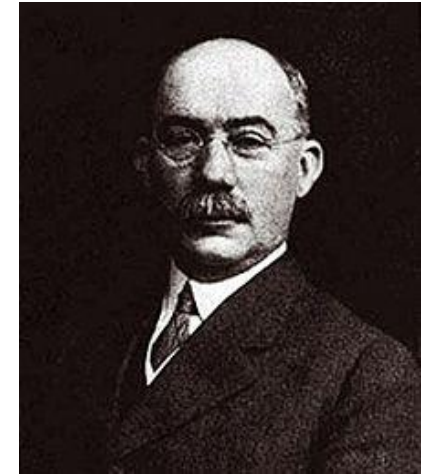
Project Gantt Chart			Apr-19	May-19	Jun-19	Jul-19	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20
Milestone	**Start Date**	**End Date**												
Complete Project	26/04/2019	31/03/2020	██	██	██	██	██	██	██	██	██	██	██	██
Designing														
Design Phase I	26/04/2019	26/05/2019	██	██										
Design Phase II	01/07/2019	25/07/2019				██								
Design Phase III	15/09/2019	31/10/2019						██	██					
Implementation														
Implementation Phase I	27/05/2019	31/08/2019		██	██	██	██							
Implementation Phase II	01/10/2019	15/12/2019							██	██	██			
Implementation Phase III	15/01/2020	25/03/2020										██	██	██
Testing														
Testing Phase I	15/07/2019	15/09/2019				██	██	██						
Testing Phase II	15/11/2019	15/01/2020								██	██	██		
Testing Phase III	01/02/2020	28/02/2020											██	

Exercise 7b: Using the blank Gantt template begin to complete for your project

Example Digital Project Management Tools
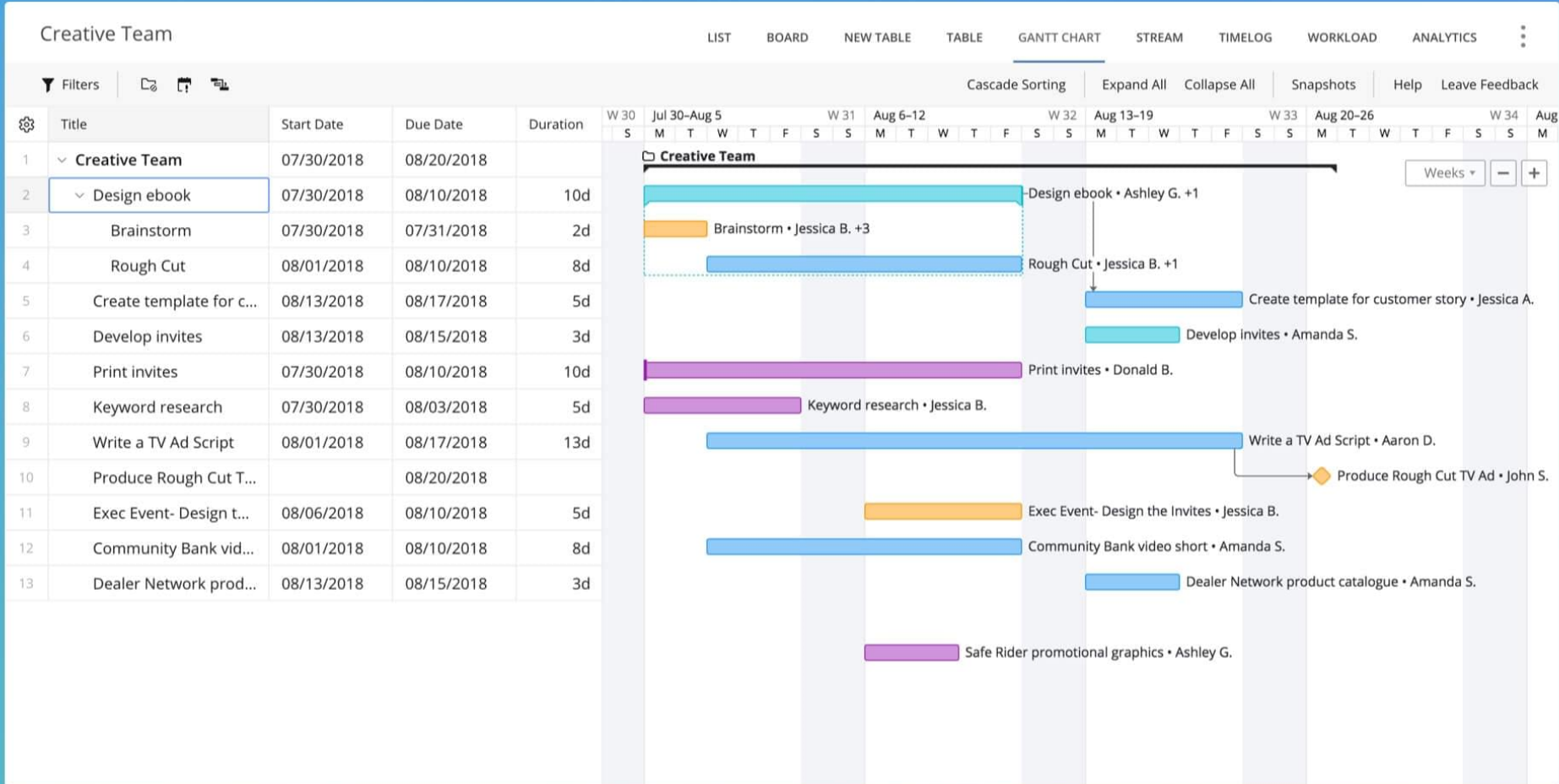
Project Management Software:

- Asana

- Trello

- Wrike (free trial only)

- Others?

Project Management Tools:

- Dropbox

- Google Drive

- Microsoft SharePoint

- Web-conference

Interactive Gantt Charts

See the "big picture", get real-time updates, create dependencies

Finance – Managing Budgets

Establish robust financial procedures

Spend authorisation, and payment processing signoff e.g. Spend over £500 to be signed by 2 different people

- Clear distinction of project income and expenditure e.g. set a project code or set up a separate spreadsheet

- Establish an overall budget and breakdown e.g. expenditure lines or monthly cashflow

- Review spend against the budget regularly e.g. monthly

- Ensure you are protecting your charity from cyber crime as well as traditional fraud/crime – the National Cyber Security Centre has lots of useful guidance

TIPS
- Use historical data
- Leverage your experts
- Baseline and re-baseline the budget
- Update in real time

Exercise 7c: Project Budget Spreadsheet

Set Budget – breakdown against headings

Detailed Headings	Project 1	Authorised	Spent	Budget Remaining
Staff Costs (Not Salary Related)	100.00	-	-	100.00
Recruitment	100.00	-	-	100.00
Training	100.00	-	-	100.00
Other Staff Costs	100.00	-	-	100.00
Temporary Salary Costs	100.00	-	-	100.00
Travel & Subsistence	100.00	-	-	100.00
Staff Travel	100.00	-	50.00	50.00
Programme Related Travel	100.00	-	-	100.00

Capturing actual spend or committed spend

Paid to	Budget line	Project Name	Description	£ Committed/ Authorised	£ Paid/Spent	Notes/ Date
Trainline	Staff Travel	Project 1	Tickets x2		50.00	

Exercise 8: Case Study

In groups, look at the case study provided. You will need to prepare a project brief to include:

- SMART aims and objectives

- Roles and responsibilities

- Skeleton timeline

- Work breakdown schedule

- Outline budget plus any additional resources needed

- Risk analysis

Section 5: Manage

Time Management Tools

Your planning will allow you to manage the project effectively

Time Management is essential. It almost always takes twice as long to complete a task as you originally thought it would take
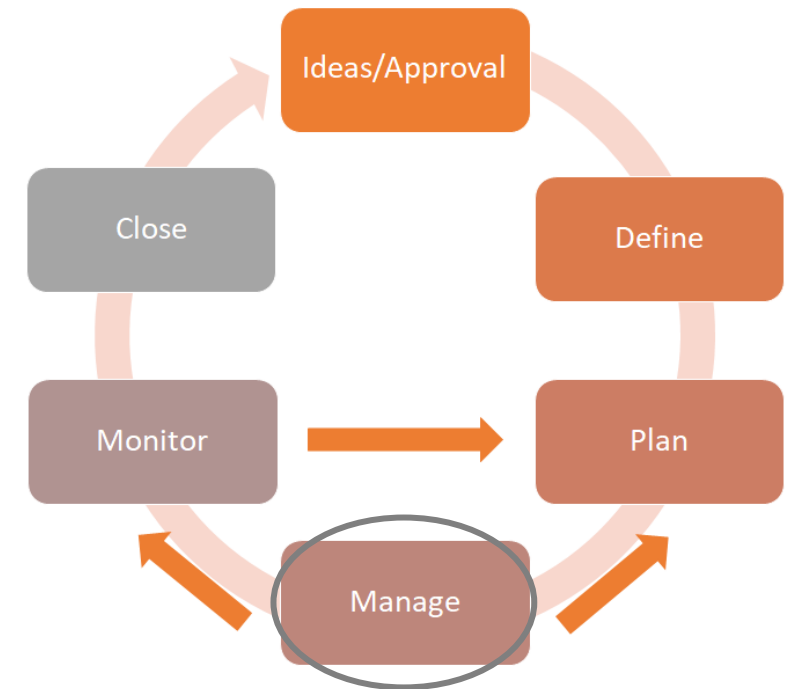
What time management tools do you use?

Time Management Tools

1. Timeboxing / Blocking/ Scheduling – Calendar

2. Productivity Ninja
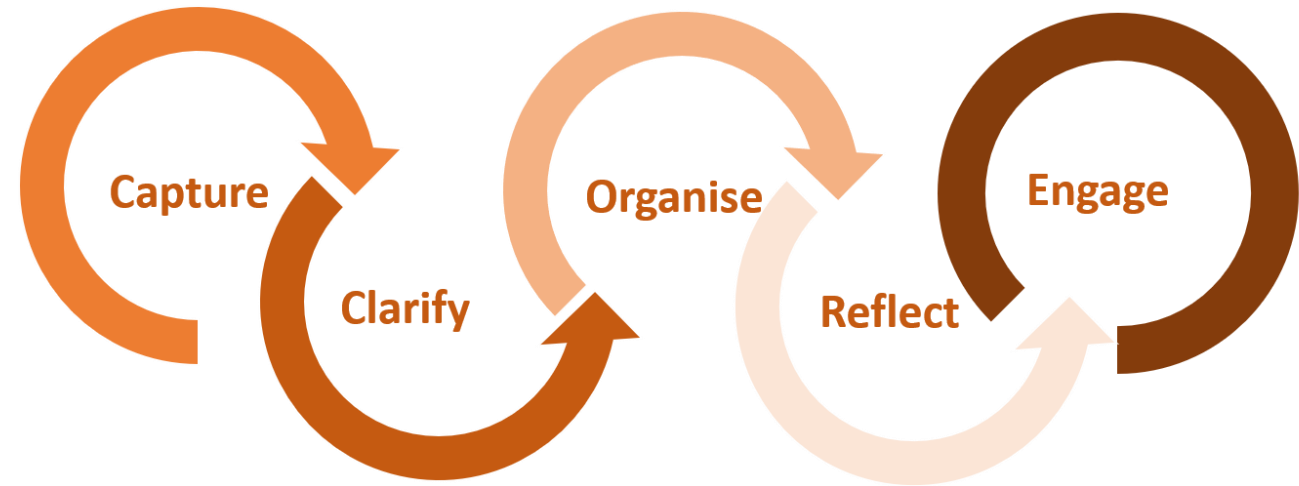
3. Eating Frogs

4. Productivity Journal

5. To Don't List

1. GTD (Getting Things Done)

2. Eisenhower Matrix

Top Tips:

- Plan
- Take regular breaks

Get Things Done

David Allen: "there is an inverse relationship between things on your mind and those things getting done"

- Capture
- Clarify
- Organise
- Reflect
- Engage

Capture | Clarify | Organise | Reflect | Engage

Capture tasks/issues/projects etc. **externally** and break down into actions. '**Move' them from your mind** to avoid stress and distraction.

Eisenhower Matrix

|	URGENT	NOT URGENT
IMPORTANT	**DO** Do it now *'Fire-fighting'*	**DECIDE** Schedule a time to do it *'Prevent & Grow'*
NOT IMPORTANT	**DELEGATE** Who can do it for you? *'Illusion of being important'*	**DELETE** Eliminate it *'Time-wasting'*

The **Eisenhower Matrix**, also referred to as Urgent-Important **Matrix**, helps you decide on and prioritise tasks by urgency and importance, sorting out less urgent and important tasks which you should either delegate or not do at all.

Section 6: Monitor

Review Progress

- Regular/scheduled reviews
- Against agreed objectives/plans
- In line with the current situation
- By the appropriate person
- At the appropriate time
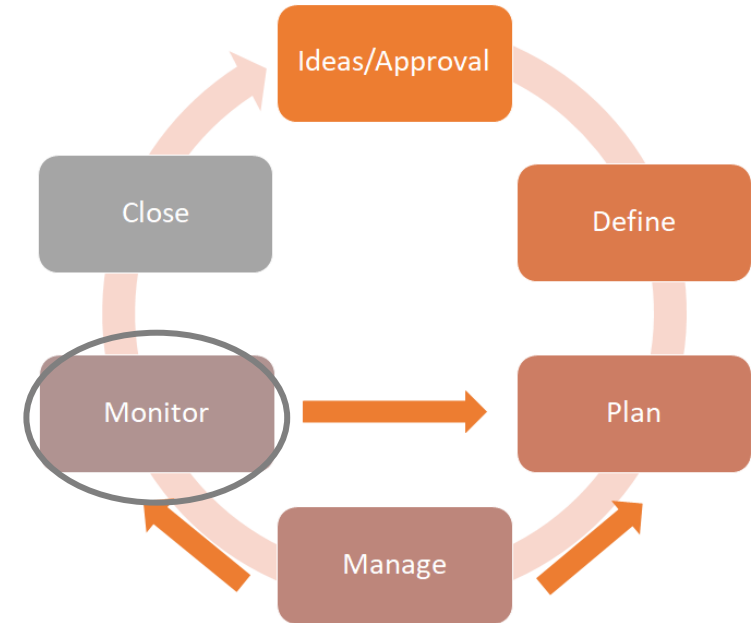
Crucial meetings for a Project

- Approving the Business Case
- Agreeing the project plan
- Agreeing briefs for project sections
- Stage/milestone review
- Final project evaluation

Briefs for each stage of your project should be signed off (Project Board?) at meetings scheduled to finish the previous stage – remember the Business Case should be reviewed at this point too!
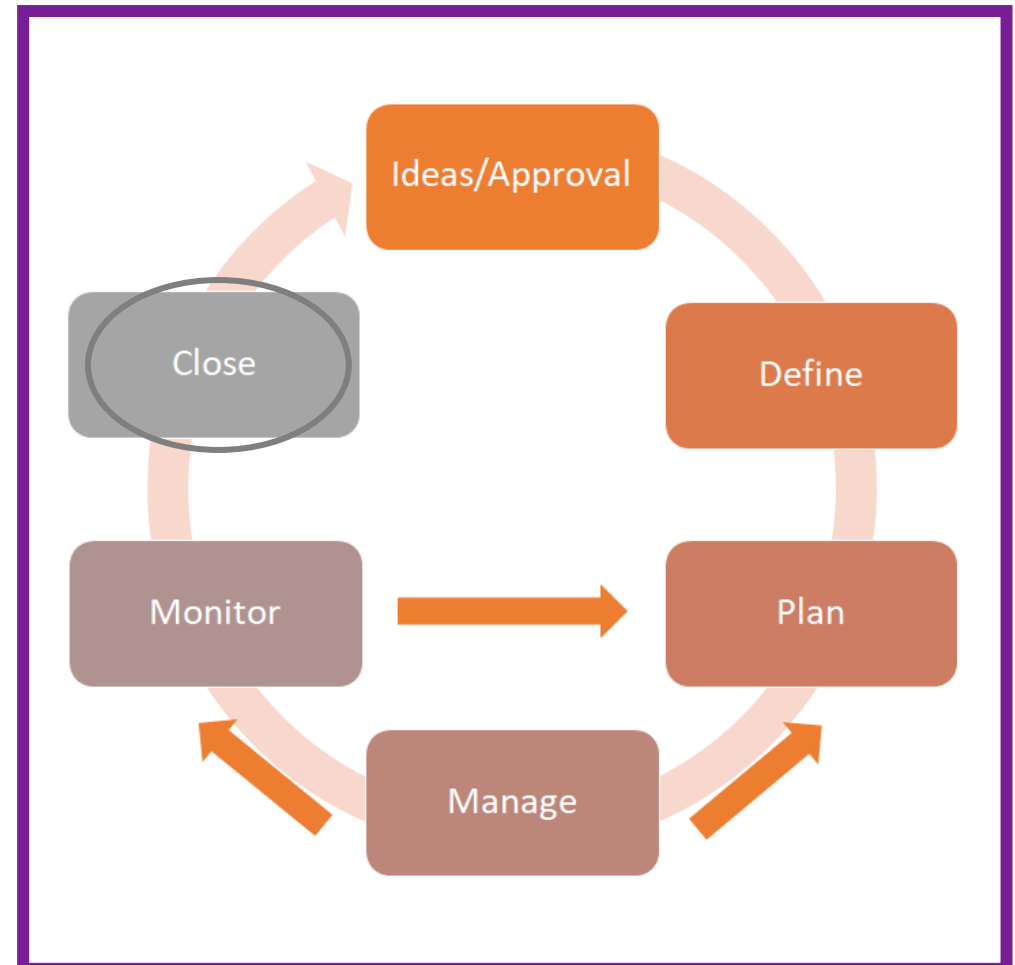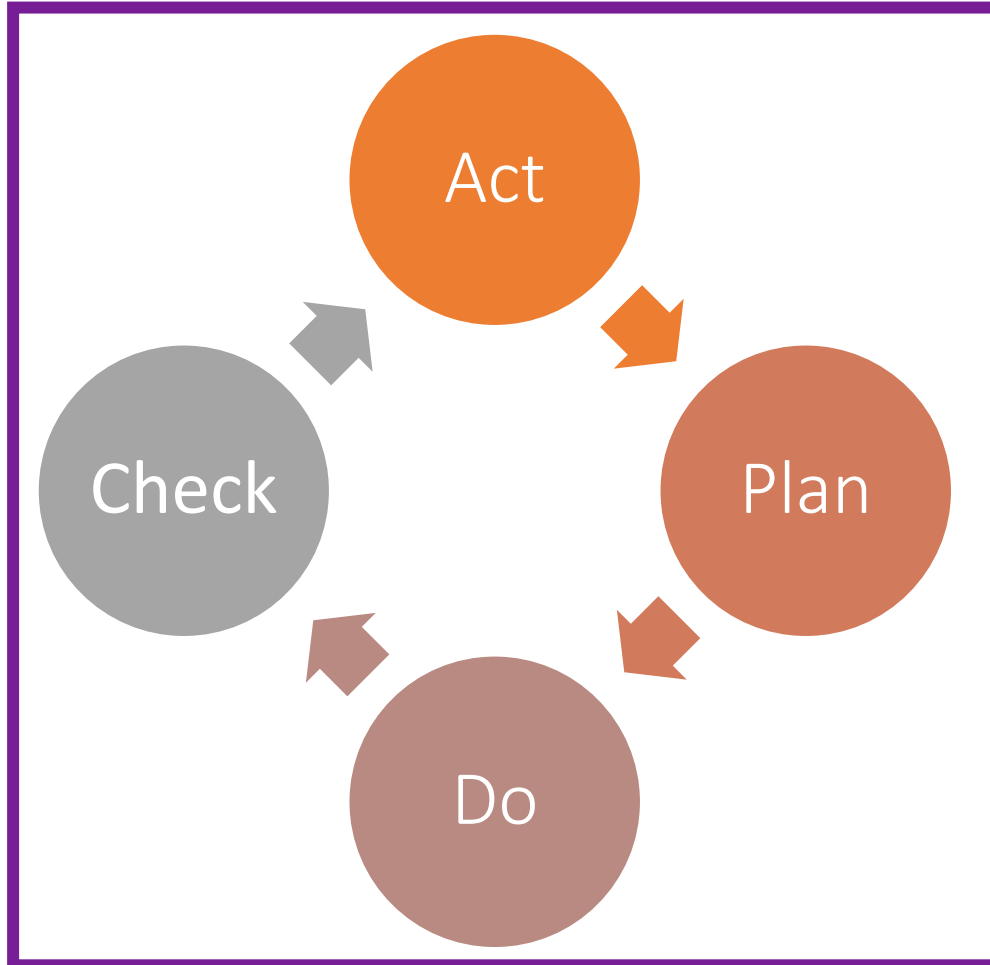
TIP
Plans and tools are only effective if others are:
- Aware of them
- In agreement with them
- Respect them

Section 7: Close

Continuous Improvement

Project Evaluation

The basic principles of the evaluation are:

- What was supposed to happen?
- What actually happened?
- Why were there differences between these?
- What have we learned?

Exercise 9: Project Evaluation

Project Name	
Date:	
Project Key Performance Indicators (KPIs)	
Were objectives met?	• Schedule • Costs • Quality of Deliverables • Customer Satisfaction
What went well?	
Recommendations to take forward	
What could have gone better?	• People/Resource Issues • Communication/Process Issues
What improvements can be made for future projects?	
Other comments/feedback	

Project Evaluation form

Closing the Project

- Deliver and report on outputs and outcomes achieved
- Check funder criteria are met (if applicable)
- Debrief, evaluation, summarise lessons learned
- Feedback to project team, funders, other stakeholders
- Stewardship!

Project Management training – Let's review what we've covered today

- **Getting Started:** Overview of project management principles and lifecycle

- **Ideas and Approval:** Business case and risk

- **Define:** Realistic expectations

- **Plan:** Structures and finance

- **Manage:** Key tools

- **Monitor:** Reviewing progress

- **Close:** Continuous Improvement

Project Management Checklist

To run a successful project you will need:

- A Business Case

- A risk register updated at each stage

- A 'lessons learned' log

These are 'living' documents

- Clear roles within the project team

- Project breakdown

- Agreed briefs for each section of work with delegated tolerances for decision-making within that section of work

- A project plan that is divided by key milestones/stages

- An independent project manager who can dispassionately keep the project on target!

theFSI

If you have any questions, please contact the FSI on admin@thefsi.org.

LinkedIn: The Foundation for Social Improvement

Twitter: @TheFSI

About Us

The FSI supports the UK's vibrant small charity sector through the delivery of heavily subsidised training and free advice in strategy, governance, fundraising and impact.

Small charities can join the FSI for free and access:

- ✓ Affordable training in fundraising, governance, impact and strategy

- ✓ Free advice

- ✓ Conferences and networking events

- ✓ 20% discount on consultancy

- ✓ Small International Development Charities programme

- ✓ Small Charity Week activities

- ✓ Regular updates and sector news

www.thefsi.org / development@thefsi.org

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