

Section 4.

Project Management

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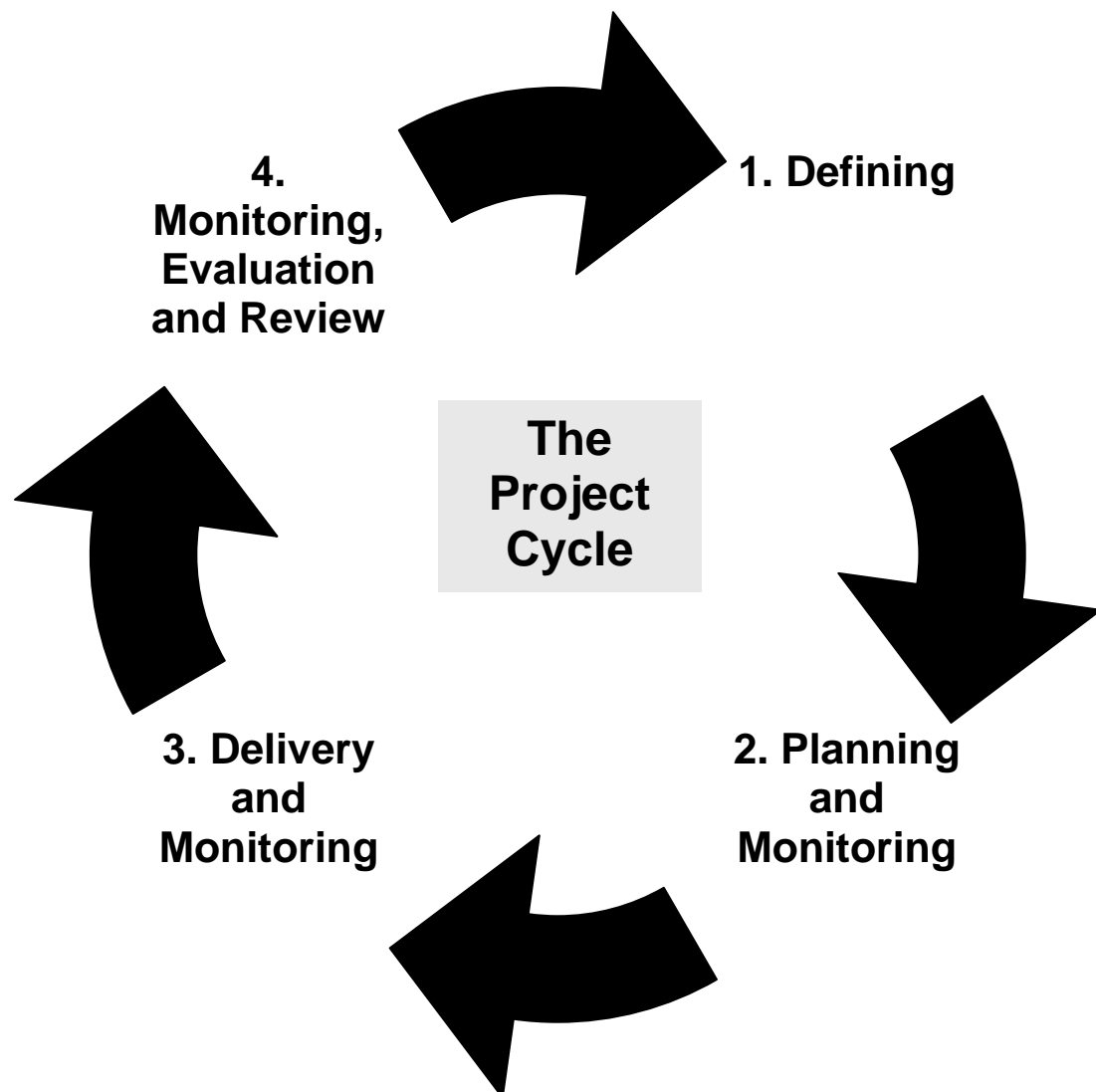
Project Management

In this chapter we'll look at the four stages of project management within a health walk project.

What is Project Management?

Project management is a series of planned activities that are carried out to achieve a specific end result within a set time frame. One person usually takes the lead on project management and has an understanding of each stage. The rest of the partnership will also play an active role.

Successful projects are made up of 4 key stages



When you reach stage 4, you can use the information to look at the project and perhaps redefine plans to suit new circumstances. In this way a project is adapted and responsive – continually moving through the stages is often called 'project cycle management.'

1. Defining

Defining your project will help to guide the planning and implementation process. In order to define your project, write a mission statement and decide on aims and objectives.

Involving stakeholders at this planning stage is crucial. Getting their 'buy in' is the first stage of successful partnership working.

Writing a Mission Statement

Mission statements can be very powerful, both within your project (keeping all partners focussed) and for people outside your project (by quickly communicating a message about your project.) It is important to take time, look at some mission statement examples, and put effort into writing a good one.

What is a Mission Statement?

You should think of a mission statement as a cross between a slogan and an executive summary.

Just as slogans and executive summaries can be used in many ways, so too can a mission statement. An effective mission statement should be able to tell people about your project's focus and ideals in less than 30 seconds.

How should I write a Mission Statement?

Here are some basic guidelines in writing a mission statement:

- A mission statement should say what your project is, what you do, what you stand for and why you do it.
- An effective mission statement is best developed with input by all the members of an organisation.
- The best mission statements tend to be 3-4 sentences long.
- Avoid saying how great you are, what great quality and what great service you provide.
- Examine other mission statements, but make sure that when you write yours it is unique.

Paths to Health wrote a Mission Statement for how we work with Volunteers –

“Paths to Health strives to invest in the development and support of volunteers to contribute to a healthier, safer and more socially inclusive Scotland through the promotion of walking”.

Bums off Seats in Fife have drafted a mission statement for their work –

“Our mission is to increase the number of people walking in their local area especially those who are currently inactive and to develop people’s knowledge of the health benefits of walking. This will be

achieved by working in partnership with volunteers recruited from communities across Fife.”

Once you have a mission statement for your work, it is useful to define the **aims and objectives** of the project – you can then go back and amend the mission statement if necessary.

Deciding on the Aims and Objectives of the project

The aims and objectives create a framework for your project. You should define the aims and objectives of your project so that you (and others) know what you are doing and what longer term change you are hoping to influence.

What are aims and objectives?

Aims are general statements of purpose or intent and are longer term
‘I want to be a millionaire by the time I am 30’

Objectives are more specific statements of what you are going to do to and are shorter term

‘I will sell 50% of my shares and invest in a new business when I’m 28’

Objectives can be written using the ‘SMART’ approach:

Specific
Measurable
Achievable
Realistic
Time-driven

Specific: A specific objective has a much greater chance of being accomplished than a general one. To set a specific objective you must answer the six **"W"** questions:

Who:	Who is involved?
What:	What do I want to accomplish?
Where:	Identify a location.
When:	Establish a time frame.
Which:	Identify requirements and constraints.
Why:	Specific reasons, purpose or benefits

Measurable: Decide how to monitor and evaluate each of your objectives. See point 4 in this chapter. When you measure your progress you: stay on track, reach your target dates, and experience the exhilaration of small achievements along the way.

Achievable: Aims and objectives should be achievable – based on the attitudes, abilities, skills and financial capacity that you have at your disposal. (See section 1 *jargon busters* for definitions)

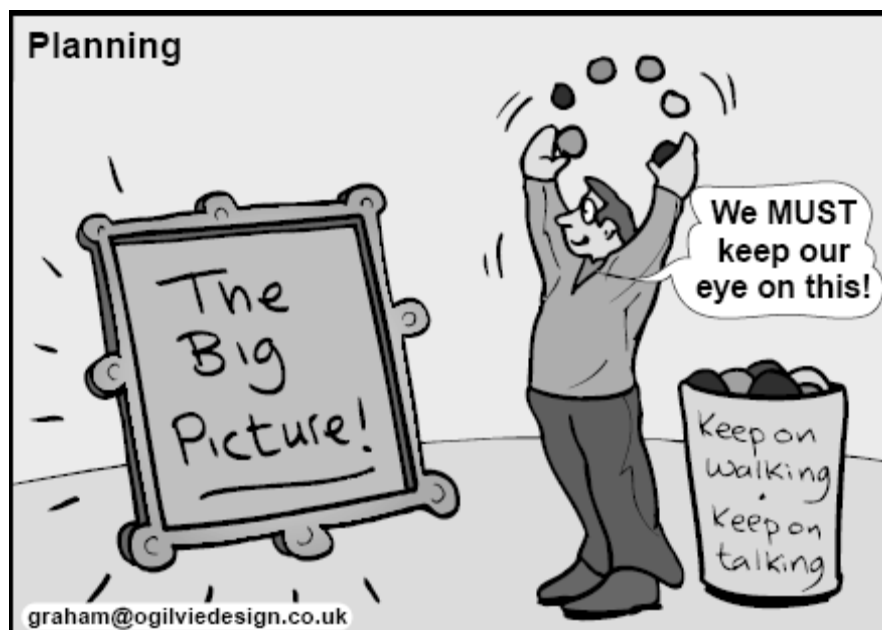
Realistic: Rome wasn't built in a day! Don't try to do everything at once – set objectives that are realistic. They should be challenging but manageable.

Time-driven: By setting timescales for the project, you can monitor progress and what you should have done by a certain time.

2. Planning

Planning at the early stages of a project is vital to its success. The benefits of planning include:

- All stakeholders know at the outset what the project will do
- Tasks can be identified and allocated to specific posts or organisations
- You will know what sort of resources you require for the project – these might be human, financial or in-kind support
- 'Training Needs' can be identified – i.e. Scheme Initiator Training, Volunteer Walk Leader Training
- Problems can be anticipated and solutions identified
- A good plan boosts confidence and makes people more motivated



To begin the planning process, you should gather all the stakeholders/ partners together to develop an **Action Plan**. See the next page for an example action plan.

Example of an Action Plan

Excerpt from an Action Plan from Walk About Stirling.

Objectives	Action	Milestones	Timescales	Work in Progress
2. Establish and develop key walking projects across communities	2.1 Undertake an audit of current walking groups across communities and communities of interest	♦ Audit completed and database established with ongoing process for updating.	December 2005	♦ Information still being researched
	2.2 Create and support walking groups with Primary Care	♦ Establish 2 Primary Care walking groups	August 2005	♦ Walk now established with Kildean Hospital on Mondays, 2.00pm
	2.3 Develop a walking group within communities/ communities of interest	♦ Establish 1 community walking project	August 2005	♦ Wednesday walk attracted a few new recruits from G.P.'s surgeries and through launch
				♦ Asian Women's Walking group started on 23 rd June and now a woman's group walking on weekly basis on a Thursday morning.
				♦ Lunch time walks for Council Employees started Wednesday 27 th July and every fortnight, attracting good number of walkers

To make your Action Plan into a manageable task, a useful exercise is to create a **Gantt Chart**. A Gantt Chart is a diagram that clearly shows which tasks need to be done and when. A Gantt Chart can be as complex or as simple as you need. Gantt charts are useful tools for planning and scheduling projects. They allow you to assess how long a project should take, determine the resources needed, and lay out the order in which tasks need to be carried out. They are useful in managing how tasks relate to another.

When a project is under way, Gantt charts are useful for monitoring progress. By regularly referring back to the chart, you can immediately see what should have been achieved at a point in time, and can therefore take any necessary action to bring the project back on course.

Creating a Gantt Chart

(A simple diagram below shows the 4 stages)

1. As a group, build up a list (in any order) of the likely activities needed in order to complete the project (refer to your list of aims and objectives as a starting point).
2. From the list, write down how long you anticipate that each task will take and when you hope to have it completed by.
3. Put together a draft on graph paper – on the horizontal line at the top, list the months (or weeks if you are just looking at a short period of time). Down the left hand side, list all your tasks. If you are comfortable using a computer, you can use Microsoft Excel or a similar package to draw Gantt Charts.
4. Plot each task on the graph paper, showing it starting on the earliest possible date. Draw it as a line or a bar of colour, with the length of the bar being the length of the task.

Example of a Gantt Chart

This Gantt chart is for 1 year – it's not an exhaustive list, just a few ideas of some of the things that might go in your chart.

Tasks

1. Identify Partners/Stakeholders who should be involved – 1 month, Jan 07
2. Assess local health inequalities – 2 months, Feb 07
3. Community consultation – 2 months, Apr 07
4. Define Project Aims and objectives – 1 month, Mar 07
5. Secure Funding for the project – 2 months, May 07
6. Appoint a project coordinator – 3 months, Aug 07
7. Develop links with local organisations – 4 month, Dec 07
8. Recruit and train volunteers – 2 months, Dec 07

TASK	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Identify key partners and stakeholders												
Assess local health inequalities												
Community consultation												
Define Project Aims and objectives												
Secure Funding for the project												
Appoint a project coordinator												
Develop links with local organisations												
Recruit and train volunteers												

You can use the Gantt Chart to make a more detailed action plan – you can add to this information such as:

- Whose responsibility is the task?
- What are the resource implications?
- Space for task-updates – so that partners can see how each task is progressing.

The following pages outline the key objectives and project planning process for developing an independent walk pack in Salisbury.

Salisbury 'Doorstep Walks' Project Planner¹

During the development phase of the Doorstep Walks Initiative the objectives were:-

1. To consult with local community groups, voluntary organisations and statutory bodies.
2. To form a steering group - 'Salisbury Walking Forum' to develop the initiative.
3. To research ten short, local, accessible walks within Salisbury and Wilton.
4. To develop, design and print a pack of walks to promote independent walking.
5. To organise a high profile launch and gain media publicity.
6. To organise the distribution of packs to GP surgeries and other organisations.
7. To monitor uptake of the packs by collecting the names and addresses of all recipients.

Objectives	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1															
2															
3															
4															
5															
6															
7															

Objective 1 - To consult with local community groups, voluntary organisations and statutory bodies.

- Held a meeting in with representatives from various community organisations, voluntary organisations, health professionals and local authority and county council representatives.
- Accessibility and affordability were key issues raised and a decision was made to promote independent walks that were short and on people's 'doorsteps'.

¹ (Prepared by Salisbury Health Promotion Unit)

- Funding was applied for from Active for Life, Salisbury Community Health Forum, Wiltshire Rural Action for the Environment and Wiltshire Travelwise. A total of £1,800 was raised.

Objective 2 - To form a steering group, 'Salisbury Walking Forum', to develop the initiative.

- In March a Steering group was set up with initial membership from the Ramblers Association, Wiltshire Wildlife Trust, Rights of Way Officer – Wiltshire County Council (WCC) and Salisbury District Council. In June the Pedestrian Officer and Travelwise Officer from WCC joined the group.

Objective 3 - To research ten short, local, accessible walks within Salisbury and Wilton.

- 8 walks in Salisbury and 2 in Wilton were identified to ensure a good spread across the city.
- The walks were written up in a standard format.
- Members of the public and individuals from the original consultation meeting 'tested' the walks.
- Maps were prepared by graphic arts department.

Objective 4 -To develop, design and print a pack of walks to promote independent walking.

- Several graphic designers were approached.
- An A5 pack and 10 individual sheets and a poster were designed.
- Printing of 1500 packs was commenced end of January, ready for Launch on March 4th.

Objective 5 - To organise a high profile launch and gain media publicity.

- Spire FM, the local radio station and Salisbury Journal publicised – 'March Forth on the 4th March'. Two walks were advertised for the general public – 'Walk into Salisbury' and the 'Cathedral Walk', led by the Dean of Salisbury.
- An official launch was organised in the Guildhall. Speakers were Dr William Bird and Adrienne Hardman. The Mayor opened the event. The invited audience included health professionals and parish and district councillors.

Objective 6 - To organise the distribution of packs to GP surgeries and other organisations.

- A letter was sent to every GP Practice and other organisations to inform them of the administrative arrangements.
- Presentations were made at Practice Nurse and Health Visitor Meetings.

Objective 7 - To monitor uptake of the packs by collecting the names and addresses of all recipients.

- Organisations who requested a supply of 10 packs were obliged to fill in a form with all the names and addresses of individuals to whom they had given the packs. This form had to be returned the Wiltshire Health Promotion Service (WHPS) before they were issued with a further supply.
- The names and addresses of individuals who applied directly to WHPS were kept for evaluation purposes.

3. Delivery and Monitoring

Ensure you keep on track, using the tools above (Gantt charts and action plans). Ensure the other partners are fulfilling their commitments and keep track of deadlines. As you begin to deliver your project, your learning will influence the action plans, some actions may not be fruitful and you and the partnership may decide to stop any further actions on some themes. You may equally come across new ideas and want to programme in some time to develop these.

4. Monitoring, Evaluation and Review

Monitoring and evaluation of a project is not something that just happens at the end of a project – it needs to be built in at every stage.

What is monitoring and evaluation?

Very simply monitoring is about the day to day collection of information. Evaluation uses this information to assess the impact of your project and demonstrate the value of your work.

- **Monitoring** is about collecting information that will help you answer questions about your project. It is important that this information is collected in a planned, organised and routine way. You can use this information to report on your project and to help you evaluate.
- **Evaluation** is about using monitoring and other information you collect to make judgements about your project. It is also about using the information to make changes and improvements.

Why should you evaluate?

Monitoring and evaluation are important for two main reasons:

1. **For learning and development**
Monitoring and evaluating your services will help you assess how well you are doing in order to help you do it better. It is about asking what has happened and why - what is and what is not working. It is about using evaluation to learn more about an organisation's activities, and then using that information to change things for the better.
2. **For accountability - to show others that you are effective**
Funders and other 'stakeholders' want to know whether a project has achieved what it set out to achieve, within agreed budgets. Accountability can relate to the impact of the work and the funds spent.

(Source: Charities Evaluation Service (2002) *First Steps in Monitoring and Evaluation*, London, Charities Evaluation Service) available at www.ces-vol.org.uk

A Guide to Self Evaluation for Paths to Health Projects

What is self-evaluation?

When an organisation uses its own people and their skills to carry out evaluation (as opposed to hiring an external agency to carry out the evaluation) this is known as self-evaluation. Monitoring and evaluation is built into the everyday activities of the project so that it becomes part of what you do.

What information should I collect?

The information you should collect should be linked to the aims and objectives of the project. Some of this information will be linked to the objectives of the project and will be concerned with the projects activities. This would include things like the number of walks undertaken or the number of walkers attending a walk. This type of information is concerned with what the project does and is also known as an 'output indicator.'

Other information that will be important will be linked to the aims of the project and will be concerned with the **effects** or **impacts** that the projects activities are having. This will include things like what the levels of physical activity achieved by walkers six months after they have attended their first led walk. This type of information is concerned with why the project exists and is also known as an 'outcome indicator.'

How do I collect information about the project?

This relates to the 'measurable' part of the SMART objectives. Paths to health have developed a series of tools which can be used to collect some of this monitoring information. This includes various data collection methods, from questionnaires relating to mental and physical health to forms that collect walkers details and demographics. Paths to Health have also created an online database to collect some of this information, primarily focused on physical activity data.

However, there are many ways in which information about your project can be collected. Think about using interviews, case studies, group meetings, diaries, comments books and more creative approaches such as photographs or poetry. Contact your Paths to Health Development Officer for more details.

For more information and links to training on using alternative approaches contact Evaluation Support Scotland www.evaluationsupportscotland.org.uk

How can I use this information?

This is the stage where you are evaluating your project. Evaluating your project requires you to make a judgement about the activities you have been carrying out based on the information you have collected. It might be useful to consider a number of questions to help guide you in the process of evaluating your project.

Has the project achieved its aims and objectives? If not, why not?
What worked well and why? What didn't work and why not?
What have we learned and what could we do differently?

How do I report on my findings?

You should find out from the beginning of your project what reports you are expected to produce and when. When many funders are involved, it is important you are not writing many different reports for each one. Paths to Health have produced report guidance which can be used as a template for writing a report.

Evaluation doesn't have to be complicated and there is help available. Contact your Paths to Health Development Officer for further advice and support. The following links might also be useful.

The Charities Evaluation Service contains a number of useful guides to evaluation. www.ces-vol.org.uk

Evaluation Support Scotland is a key site for support with monitoring and evaluation in Scotland. Contains links to guides, toolkits and training. www.evaluationsupportscotland.org.uk

Scottish Community Development Centre - LEAP Support Unit contains contact information to get advice and support in using the Learning Evaluation and Planning (L.E.A.P.) approach to participatory planning and evaluation. www.scdc.org.uk