Make it happen: An overview to project management
Using this pack…

• This pack provides an overview of the staged approach to project management and identifies and outlines the key steps and events required to effectively work through the project process

• It is designed to be used by NHS project managers with varying levels of experience

• By the end of the pack, individuals should have a thorough understanding of the different stages of a project and should be ready to embark on a specific service improvement project

• Remember that an explanation of words or terms that may be new or unusual can be found in the glossary pack
A reminder of where this stage sits in the overall structure…

**Delivering successful service improvement projects**

- **Induction**
  - Introductory pack
  - Project management overview

- **Preparation**
  - Project mobilisation

- **Deliver the project**
  - Scope the project
  - Baseline / Diagnostic
  - Design changes
  - Implement
  - Embed

- **Enhance skills**
  - Learning review

**Rapid Improvement Event (RIE)**
1. Delivering successful projects

2. Managing the process
   i. Scope
   ii. Baseline
   iii. Design
   iv. Implement
   v. Embed
   vi. Gateway review meetings
There are many definitions of a project: this simple definition, linking projects to change, is a good starting point.

The project is the process for bringing about the change needed to move from point A to point B.

Problem Opportunity Need

Process to bring about change

Benefit Solution
There are a number of benefits from adopting a standardised process for managing projects

- **Transparency and consistency**: Clear measurement, reporting and communication are crucial factors in delivering successful projects. A common approach enables more transparent communication and progress monitoring.

- **Effectiveness**: Pausing at key points provides an opportunity to step back and reflect on the progress of the project to date. This has been shown to reduce the overall risk of a project, as issues can be identified and addressed early.

- **Efficiency**: A shared methodology eliminates the need to re-invent project management tools and approaches on every project.

- **Better planning**: This methodology enforces detailed planning, requires formal consideration of risk and identifies priorities for funding and use of other scarce resource.

- **Better management**: Use of the right project management tools enables project managers to proactively manage risk, quality and change rather than reacting to them.

- **Greater individual autonomy**: Project managers, operating within the framework, will have defined and agreed authority to achieve their objectives.
Using a staged (or gated) process is recognised as being the most effective way to manage projects to bring about change

- To ensure their successful delivery, projects should be divided into discrete, manageable and logically ordered stages of work

- A staged delivery provides structure and discipline to the project process and helps to ensure that project tasks are completed at the most appropriate time in the project lifecycle

- A review process at the end of each stage ensures that all the steps required for delivering the project are properly completed at the appropriate time - before moving onto the next stage

- A staged delivery process ensures that issues are addressed at the correct time and reduces the likelihood of significant rework at a later stage in the process

- In certain circumstances, the decision may have to be taken at the end of stage review not to proceed any further with the project
This guide details a 5 stage process developed to support the delivery of service improvement projects.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Key question</th>
<th>Key tasks</th>
<th>Outputs</th>
</tr>
</thead>
</table>
| Scope project  | • Is there a strong rationale for the project and are the potential benefits defined? | • Establish team  
• Complete PID  
• Engage stakeholders | • PID  
• Stakeholder plan |
| Baseline / Diagnostic | • Is your starting point clearly understood and agreed? | • Map current state  
• Collect data / information | • Validated current state  
• Baseline agreed |
| Design changes | • Have you agreed your desired future state? | • Gather best practice  
• Map future state  
• Agree changes to current state | • Validated future state |
| Implement      | • Have you successfully delivered your project and can your benefits now be realised? | • Project planning  
• Deliver agreed changes | • Solution delivered  
• Start of benefit realisation |
| Embed          | • How will you ensure your changes become everyday practice and are spread more widely? | • Manage hand-off to local staff  
• Conduct post-implementation review | • Embedded skills  
• Post-implementation review |
1. Delivering successful projects

2. Managing the process
   i. Scope
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   iii. Design
   iv. Implement
   v. Embed
   vi. Gateway review meetings
Within each stage of the delivery process, the project manager should organise a number of key events or workshops to increase the chances of success.
1. Delivering successful projects

2. Managing the process
   i. **Scope**
      ii. Baseline
      iii. Design
      iv. Implement
      v. Embed
      vi. Gateway review meetings
Scoping the project: A project kick-off meeting should be held at the start of the scoping phase

**Purpose**

- **The project sponsor should:**
  - Set the context for the work the project team will complete over the coming weeks / months
  - Ensure the team understand the importance of the project for the wider organisation

- **The project manager should:**
  - Brief the team on the project process
  - Confirm the membership of the project team
  - Start to identify project stakeholders

**Expected outcomes**

- Membership of the project team is confirmed
- Key stakeholders have been identified
- A date is set for the scoping workshop

**Format**

- The meeting should be led by the project manager and project sponsor
- The project team should attend – along with supporting members or interest groups considered to be central to successful project delivery (note: project teams will vary in size according to the nature of the project)
- The meeting should be scheduled for 1-2 hours
Scoping the project: The scoping workshop should establish the project boundaries identifying what the project will, and will not, deliver

Purpose

- To gather the content required to complete a Project Initiation Document (PID)
- In particular, the project manager should:
  - Explain the rationale for the project
  - Facilitate a discussion to agree the project objective
  - Support the team in determining a list of benefits that will result from achieving the project objective – start to think about how these will be demonstrated
  - Identify, with the project team, any risks and/or issues that could impact on the successful delivery of the project
  - Define with the team the key project workstreams
  - Agree broad timelines for the project, meeting arrangements and responsibility for any immediate actions arising

Expected outcomes

- The project manager has gathered the content required to complete the PID
- The project manager has committed to a date for completing the PID and circulating for review
- A date is agreed for the scoping phase gateway review

Format

- The meeting should be led by the project manager and attended by the project team
- The meeting should ideally be scheduled for a half-day
Content

1. Delivering successful projects

2. Managing the process
   i. Scope
   
   **ii. Baseline**
   
   iii. Design
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   v. Embed
   vi. Gateway review meetings
Baselining: It is important to identify, and subsequently collect, data that shows the current performance of the service.

**Workshop purpose**
- To identify the data that captures how the service currently performs
- In particular, the project manager should work with the project team to identify:
  - Data that confirm the rationale for the project
  - Data that proves the baseline position
  - Data that will be able to demonstrate that the project has achieved its objective
  - Data that will be able to demonstrate that the project benefits have been realised

**Expected outcomes**
- Identification of the agreed set of metrics that need collecting
- Responsibilities and timescales for collecting the metrics are assigned

**Format**
- The session should involve staff from across the system – in particular, ensure that information analysts are included
- If possible, present any relevant data that has been collected in advance of the meeting
- The session should be facilitated by the project manager
- The session should be scheduled for 1-2 hours
Baselining: A workshop should be organised to map the current state of the process – often called a ‘brown paper exercise’

**Purpose**
- To understand the service as it is currently provided to patients to enable improvements delivered by the project to be assessed
- To map the current (“as is”) patient pathway to illustrate:
  - The entry points into and exit points from the pathway
  - The flow of patients through the pathway
  - The information and material requirements at each stage of the pathway
  - The decision points within the pathway
  - The timelines within the pathway (including any deadlines required to meet targets, e.g. 18 weeks)

**Format**
- The session should involve staff from across the system
- It should be facilitated either by the project manager or an external facilitator
- The meeting should be scheduled for a half day

**Expected outcomes**
- The current, “as is” process / patient pathway is documented and agreed
Content

1. Delivering successful projects

2. Managing the process
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      vi. Gateway review meetings
Designing the changes: A workshop should be organised to map the future state of the process

**Purpose**
- To review and critically analyse best practice
- To brainstorm potential improvements that could be made to the current “as is” patient pathway or service specification
- To define and document the new patient pathway or service specification. For new patient pathways, consider:
  - The entry points into / exit points from the pathway
  - The flow of patients through the pathway
  - The information and material requirements at each stage of the pathway
  - The decision points within the pathway
  - The timelines within the pathway (including any deadlines required to meet targets, e.g. 18 weeks)

**Expected outcomes**
- The future patient pathway or service specification is agreed

**Format**
- The session should involve a range of staff from across the system
- It should be facilitated either by the project manager, or alternatively an external facilitator
- The meeting should be scheduled for a half day
Designing the change: A business case workshop should be organised to consider and document the impact of the proposed changes *

**Purpose**
- To gather the content required to complete the business case
- In particular, the project manager should ensure that the project team can:
  - Confirm the case for change
  - Describe the current position
  - Describe the desired future state
  - Identify (and quantify) the project benefits
  - Establish the financial impact of moving to the new service model

**Expected outcomes**
- The project manager has gathered the content required to complete the business case
- The project manager has committed to a date for completing the business case and circulating for review

**Format**
- The session should involve the core project team and other staff from across the system, as necessary
- It should be facilitated by the project manager
- The meeting should be scheduled for a half day

* It may only be necessary to complete business cases for more complex projects or ones that require additional investment
Content

1. Delivering successful projects

2. Managing the process
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   v. Embed
   vi. Gateway review meetings
Implementing change: A workshop should be organised to agree the plan for the implementation phase of the project

**Purpose**

- To identify and agree the different workstreams that are necessary to deliver the desired future state
- To develop an implementation plan that identifies the key tasks within each workstream
- To ensure that:
  - Responsibility for completing tasks is assigned to an individual
  - Timescales for completing tasks are agreed with the responsible individuals
  - The interdependencies between the tasks should be understood

**Expected outcomes**

- The implementation plan is completed and agreed with the project team

**Format**

- The session should involve staff from across the system and, in particular, those involved in designing the desired future state
- It should be facilitated by the project manager
- The meeting should be scheduled for a half day
Implementing change: Regular progress review meetings should be scheduled throughout the implementation phase

**Purpose**

- To review progress against the implementation plan on a regular basis
- To track the completion of actions agreed at previous project review meetings
- To identify and agree the actions to be completed in the next period
- To review any risks and/or issues that may impact on project delivery – and agree and assign mitigating actions
- To identify areas where support from the project sponsor and/or senior stakeholders is required

**Expected outcomes**

- Implementation plans are updated to show the tasks that have been completed
- The actions to be completed in the next period are agreed
- The risk and issue log is updated
- A date for the next progress meeting is agreed

**Format**

- The meeting should be led by the project manager and attended by the core project team
- The meeting should typically be held on a weekly or fortnightly basis with the same agenda/structure each week
- The meeting should be scheduled for 1 hour
Content

1. Delivering successful projects

2. Managing the process
   i. Scope
   ii. Baseline
   iii. Design
   iv. Implement
   v. **Embed**
   vi. Gateway review meetings
Embedding change: An end of project review meeting should be organised to assess the success of the project and capture learning for the future

**Purpose**
- To communicate the achievements of the project
  - Did the project achieve its objectives on time, within budget and to the desired level of quality?
  - What benefits have been realised to date?
- To identify areas where the service could be improved further
- To gather together key lessons that will enhance the project process in future
  - What worked well and should be continued?
  - What could be improved in the future (and in what way)?

**Expected outcomes**
- The project manager has gathered the content required to complete the end of project report
- The project manager commits to a date for completing the end of project report and circulating for review

**Format**
- The meeting should ideally be led by an external facilitator
- The meeting should be attended by the project manager, the project team, the project sponsor, and local staff who will be responsible for supporting the new pathway or service
- The meeting should be scheduled for a half day
Content

1. Delivering successful projects

2. Managing the process
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A gateway review meeting should be held at the end of each stage of the standard delivery process

• Gateway review meetings ensure that each step in the standard delivery process is completed properly before the project moves on

• Gateway review meetings should review progress against agreed criteria and ensure project issues have been addressed

• This approach helps to provide a solid foundation for the project to move to the next stage of delivery

• If the project has failed to satisfy key gateway criteria or significant issues remain, then the project should not progress and more work should be undertaken

• If a gateway review meeting reveals that many of the gateway criteria have not been fulfilled, the project manager and team should revisit the PID and objectives to understand why. It may be that the scope or objectives of the project need to be changed or that the project should, in fact, be closed down
Gateway review meetings should follow a similar format regardless of the stage in the standard delivery process

- The format for gateway reviews will vary but it is important that rigorous reviews are completed – whilst accommodating local preferences

- Gateway review meetings should be organised carefully, to ensure that the right people can attend and that there is sufficient time for the meeting to cover the necessary ground

- The meeting should be led by the project manager and, at a minimum, attended by the project sponsor, the clinical champion and a representative of the project board

- All relevant documentation should be prepared in advance and made available to the reviewers

- Gateway review meetings should typically be scheduled for 1-2 hours
The gateway criteria, documentation and expected outputs will differ for each stage in the standard delivery process.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Scope project</th>
<th>Baseline / Diagnostic</th>
<th>Design changes</th>
<th>Implement</th>
<th>Embed</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Project lead and project team members confirmed</td>
<td>• Current state mapped, understood and agreed</td>
<td>• Future state mapped, understood and agreed</td>
<td>• Project plan completed and new service operational</td>
<td>• Successful handover to operational staff</td>
<td>• End of project report completed</td>
</tr>
<tr>
<td>• Defined and realistic scope</td>
<td>• Baseline data / information collected and validated</td>
<td>• Service specification signed-off</td>
<td>• End of project report signed-off</td>
<td>• Handover checklist</td>
<td>• End of project report signed-off</td>
</tr>
<tr>
<td>• Potential benefits identified</td>
<td>• Clinical engagement</td>
<td>• Business case signed-off</td>
<td>• End of project report</td>
<td>• Stakeholder analysis and engagement</td>
<td>• Project formally closed</td>
</tr>
<tr>
<td>• Stakeholder analysis and engagement</td>
<td>• Project lead and project team list</td>
<td>• Completed data matrix</td>
<td>• Future state map</td>
<td>• PID</td>
<td>• PID signed-off</td>
</tr>
<tr>
<td></td>
<td>• Project team list</td>
<td>• Service specification</td>
<td>• Business case</td>
<td>• Approved</td>
<td>• Learning log updated</td>
</tr>
<tr>
<td></td>
<td>• Stakeholder analysis</td>
<td>• Business case</td>
<td></td>
<td></td>
<td>• Approval to start baseline / diagnostic</td>
</tr>
</tbody>
</table>

Documents:
- PID
- Project team list
- Stakeholder analysis
- Current state map
- Completed data matrix
- Future state map
- Service specification
- Business case
- Implementation signed-off
- Learning log updated
- Approval to start embed
- End of project report signed-off
- Project formally closed

Expected outcomes:
- PID signed-off
- Learning log updated
- Approval to start baseline / diagnostic
- Current state validated
- Learning log updated
- Approval to start design changes
- Future state and service spec validated
- Business case approved
- Learning log updated
- Approval to start implement
By the end of this module, users should…

• Have a good understanding of the different stages of a project

• Understand the benefits of using a staged and gated project process

• Be ready to start their own service improvement project