Turning Good Ideas into Successful Projects

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Good ideas are the start point – realising them requires CHANGE to take place.

Significant changes benefit from being managed as “Projects”.

“Project Management” is big business and can get very complex. But the key principles are the same for ALL projects and are quite logical, and not complicated.

Objectives of this talk: to explain these principles, and set out a simple practical project management approach appropriate to the kind of projects run by local charities, which can help you ensure successful outcomes.

Project Management is simply **structured common sense**

Aim: inspiration not intimidation!

The Three Phases of a Typical Project



Phase	What this means
Define	Set out the objectives, how you aim to achieve them, and any other significant considerations e.g. costs
Plan	Break the big picture down into constituent parts, to produce a detailed project plan
Deliver	Actively managing the project while it's running, checking things are going OK, dealing with issues, problems etc See things through to completion!

These steps are sequential i.e. need to be done in order.

Agreeing something along these lines can give your organisation the basis of a Project Management framework, to be applied whenever something is agreed to be "a project".

Will consider each of these phases in turn in the following slides

DEFINE: getting things moving!

You've got a great idea…when defining it as a project here are the key aspects to consider:

What are we planning to do?
Why are we doing it?
What are the expected tasks involved, and who will be doing them?
Who within our organisation is going to take the lead? Two key roles: Project Manager and the Project Sponsor.
Expected timescale?
Expected costs? Both for the project itself and any impact on annual running costs
Any key Risks, and possible mitigation

Typically these will be discussed and agreed over a period, but once consensus reached should be written down, and formally approved. Simple approach: a 2-3 page "Scope Document" in Word *(other terms and other formats are available!)*

Why is writing it down important?
Forces agreement, avoids confusion and misunderstanding, provides reference point for the whole project, allows clear identification of extras and helps avoid "scope creep".

PLAN (1): break down into constituent parts

The key start point for planning in detail is breaking a complex activity down into its constituent parts. Take a scenario of a charity which has premises whose lease is running out soon, so we need to move. What are the main individual tasks involved?

- Finding a new premises!
- Negotiating and securing a lease
- Communicating the move to the outside world: notifying contacts, changing web site, email footers, stationery
- Liaising with suppliers e.g. electric, water
- IT operations: internet, wifi, network, telecoms
- Detailed plan for the move day itself e.g. packing, synchronising the move, unpacking and getting up and running

PLAN(2): develop the detailed Project Plan

Break things down into areas, then Tasks within each area, and for each one set out who is responsible, timescale, dependencies etc. This then gives you a clear Task List (=Project Plan).

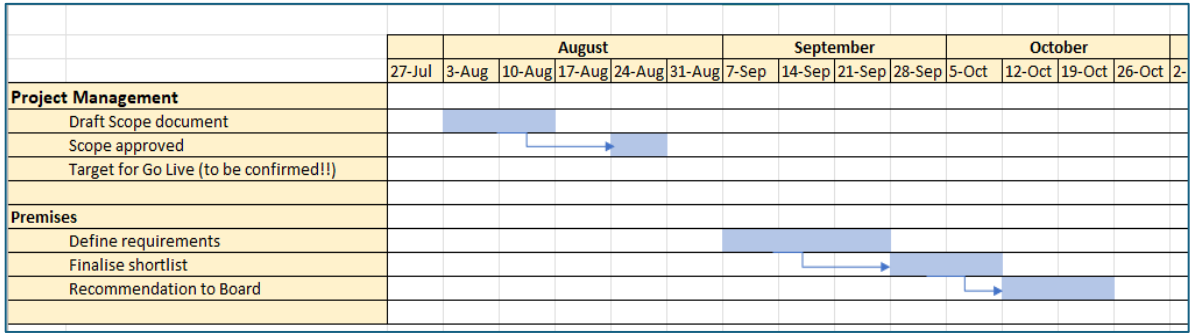
For example:

Task identifier | Dependencies | Description | Who is doing it | Target completion date

Areas of work

Secure new premises					
	PREM1		Document requirements and contact estate agents	Gillian	03-Jul-26
	PREM2	PREM1	Produce short list for Board to consider	Gillian	31-Aug-26
	PREM3	PREM2	Negotiate lease	Gillian	30-Sep-26
	PREM4	PREM3	Sign lease	Board	31-Oct-26
Organise suppliers					
	SUPP1		Organise plan with Sure for Telecoms	Adam	30-Nov-26
	SUPP2		Organise plan with Guernsey Water	Fred	30-Nov-26
	SUPP3		Organise plan with Guernsey Electric	Karen	30-Nov-26
Admin and IT changes					
	ADIT1		Web site changes	Helen	31-Dec-26
	ADIT2		Stationery changes	James	31-Dec-26

Can also use Excel to show same info as a timeline…



DELIVER: the key is ACTIVE project management!

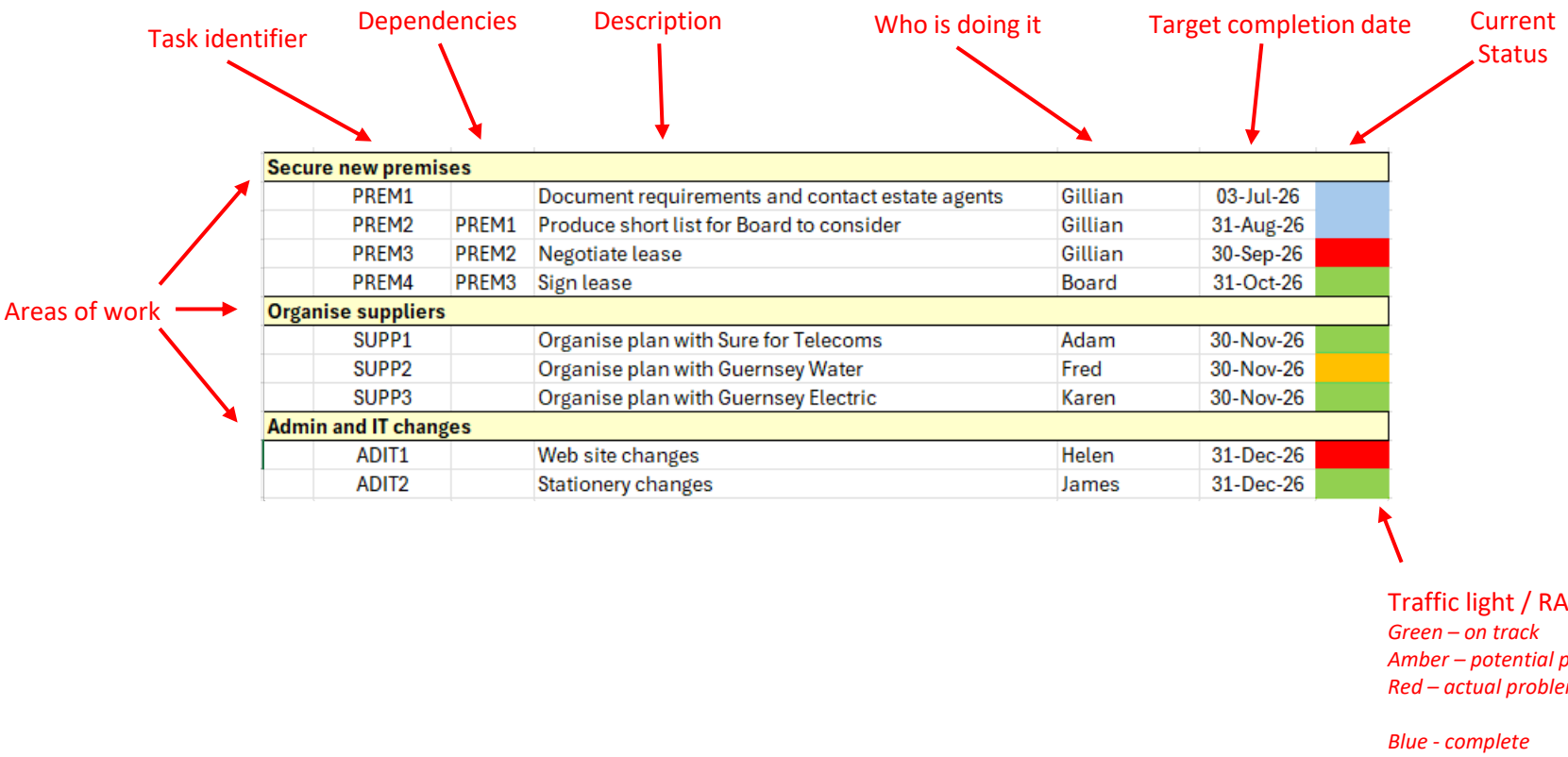
A Project Plan does not manage the project – a Project Manager does!

Top tips for active project management:

- Above all, provide drive and dynamism! Not everyone likes change…
- Keep track across the board via regular conversations/meetings.
- A note should be taken of any key meetings/calls – but just Decisions & Actions!
- Use the Project Plan for progress reporting, adjusting as required – the plan WILL change in response to the real world – but make sure it does so in a controlled and sensible way
- Focus on problems (and resolving them) more than on what's going well
- Regular reporting and consultation with Sponsor / Board – report back honestly, not optimistically. Always try to present a solution to problems.
- Change Control: any significant changes to scope, costs or timescale should be notified to the Board for approval
- Set up a shared folder for all key project documents (e.g. Sharepoint, or network folder)

DELIVER(2): basis for Progress Report

Use the Project Plan, updated each week to reflect latest status:



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Deciding when something is “a project”

Changes come in all sizes…at what point should a change be regarded as “a project?”

No single answer to this (and may vary by organisation), but here’s a suggestion:

- Your charity considers it a “significant” change
- Multiple activities involved
- Inter-connections between these activities (=“ dependencies”)
- Multiple people or organisations involved
- Costs involved

If two or more of the above are true it starts to feel like a project!

Why does it matter if it’s a “project”? Because it invokes the Project Management framework. This then raises the profile, provides a control structure, active management, supports teamwork, allows progress to be monitored. It helps avoid chaos and achieve success!

Scale matters: organising a small event may not be a project, a larger one might be.

In conclusion

Project management is a massive industry, but most of the “extras” are more relevant to much larger projects – focus here on simple practical approach for typical local charity projects

Keep in mind the key principles. Specialist software is not essential: Word, Excel, and regular meetings and discussions can take you a long way!

You do not need to be a professionally qualified Project Manager. You simply need:

DEFINE
Set out the objectives

→

PLAN
A realistic plan for the tasks involved

→

DELIVER
Active management all the way through

Being organised is the key – remember “**Structured Common Sense**”!

Further assistance:

- *Copy of presentation available*
- *Support available via AGC to help on an ad hoc basis*
- *Happy to do further (more detailed) sessions if of interest*

Q & A