

# Project Management

So you've got a great idea for a project or an event in your local community – where do you start? The success of a project can ultimately come down to the level of organisation and planning put in to make it happen. Use this sheet as a guide to help you get started and to know what sort of milestones you'll need to reach along the way.

## WHY PLAN?

- Planning helps you achieve your goals and will make your project run smoothly.
- Planning will help your group save time, money, & stress.
- If you are applying for funding or grants you will need to show the funding agency how you are going to make your project happen – which will give them understanding and confidence in your project.
- Good planning helps you easily deal with any unexpected issues or problems that crop up.

## FOUR STAGES OF PROJECT PLANNING

### STAGE 1 – Initiation / Start up

What do you want to do? What do you need to do in order to achieve this? How will you know that you've achieved what you set out to do? These are the first questions you need to answer when starting your project.

At this point some other things you should consider and discuss are:

- A **name** for your project.
- **Project co-ordinator** – although it is likely that there will be many people in your group that will work on the project, it can be a good idea to appoint one person as the manager or co-ordinator to be responsible for keeping the project on track.
- **Objectives** – why are you doing this project, and what do you want to achieve by doing it?
- **Audience** – who are you doing this project for? What are their interests and/or needs?
- **Other similar projects** – do any exist? Could your objectives be (better) met by co-operating with an existing project?
- **Deliverables** – what will be produced at the end of the project?
- **Scope** – what exactly does the project entail? How long will it take, how much resource will it need? What will be included and what will not?
- **Relationships** – what other people or projects might be affected by or will affect this project? Can you or do you need to involve them, or at least inform them?
- **Resources** – what do you need to make this project happen (e.g. time, money, people, skills, equipment)?
- **Schedule** – create a timeline of deadlines for when

things need to be completed by. It can be helpful to work backwards from the project finish date or the date of the event.

- **Risks or Risk Management** – what might threaten this project or stop it from going ahead? What might go wrong and how can you prevent this or reduce risks?

### STAGE 2 – Planning

In this stage you need to work out the specifics of your project (what, when, why, how, & who). It can be a good idea to write down all the steps required to make your project happen. That way you can envisage a timeline and also assign jobs to members of your group. For example, below is a simplified version of a project plan or timeline:

#### Project: New roof for local community hall

1. Talk to hall owners and outline what you want to do, find out if there are any consents that need to be obtained etc.
2. Develop your project plan (budget, timeframe) – How much do you want/need to spend? When do you want to have the project completed by?
3. Obtain quotes to have the roof replaced. Obtain more than one quote for the work – to compare prices and this will also be necessary if applying for public funding.
4. Identify how you are going to pay for the project and develop a funding plan. (*See sheet 11a for more information on this*). Do you need to fundraise? What funding options are available?
5. Apply for funding\*/complete fundraising activities (these will obviously require their own organisation and planning and are almost a separate project on their own!).
6. Once funds are secured, arrange for work to be completed.
7. Pay contractor and complete funding accountability forms if applicable.

\* Funding cut off dates and application outcome dates may determine what your timeline will be.

### Tip

It is a good idea to consider the long term operation of your project or facility and to think of the 'bigger picture'. Some grants don't cover ongoing maintenance so you may need to consider this in your overall long term budget. For example – if you are replacing the spouting on a building it may be better to go for option A which is more expensive but will last 15 years, rather than option B which is much cheaper but is only going to be good for 5 years.

There are other things that you will need to organise and think about on a more in depth level during this stage:

### **Budget/Funding**

- What will the costs of the project be? Think about any unforeseen costs that might pop up. It can be a good idea to plan for a 10% funding contingency for larger projects, so things don't stall part way through.
- What funding could be available? (*see sheet 10 for information about funding in Southland, and Sheets 11a & 11b about completing funding applications*).
- It is not a good idea to start a project before you know that you have all the necessary funding, and some funders won't grant funds if you've already started the project (this is called 'retrospective funding'). Also remember that funding applications can take months to apply for, be considered and then paid out, so plan for this accordingly if you are relying on funding from outside sources.

### **Monitoring & Reporting**

- Who do you need to keep informed of progress, budget etc (e.g. the board, your funders and supporters), and how will you do this (e.g. monthly reports).
- You could provide a progress report or review your funding plan at each meeting of your organisation.

### **Communication**

- How will you let the public, media, and any others with interest in the project know about your project?
- What do you need to tell them and when (e.g. confirmation of performing acts in a festival, and when are the tickets available etc, or what you are working on and how the community can be involved).
- What ways of communication does your target audience use? (e.g. for a youth event this may be social media or text).

### **Risk Management/Health & Safety**

- How will you manage any potential risks to the project? These may range from financial and public relations risks to health & safety risks.
- What will you do if you can't raise enough funds?
- If you're using volunteers or conducting a sporting event or concert etc you need to know your health & safety risks and responsibilities – do you need an audited health & safety plan, and a traffic management plan? Do you need public liability insurance?

## **STAGE 3 - Implementation**

Now it is time to put everything together and all your planning and hard work will come to fruition as you undertake your event or project.

### **Important Points:**

- Leadership is important – there needs to be someone "in charge" coordinating and driving the project.
- Stick to your plan but you may need to be flexible and adapt as things change (e.g. unforeseen events that happen on event day, or project deadlines that are missed).
- Delegate simple tasks to volunteers - leaving you and your team members to oversee the project and deal with any problems or unforeseen issues that may arise.
- Make sure the workload is spread out evenly for those organising and over a reasonable time period to avoid volunteer burn out.
- For events - make sure your team and volunteers have enough food, water, sunscreen etc and ensure that they have breaks when needed.
- Communicate with sponsors and supporters - make them feel welcome at events and update them on project progress and outcomes.

## **STAGE 4 - Finishing**

Now your project has been completed or your big event day is over but your work is not quite complete. It is very important to finish everything off properly and to acknowledge those who helped to make your project happen.

- Leave any venues as clean and tidy as possible - very important if you want to use them again next time.
- Thank your volunteers and sponsors/supporters/funders as soon as possible after completion (preferably in writing). Remember that without them events and projects simply wouldn't happen. Send them photos or mementos (remind them why they might like to help out again next time).
- If applicable post any results or information promised to participants on your website as soon as possible after completion.
- Debrief or evaluate with your team shortly after completion when everything is fresh in your minds - this is where you note what went well and what difficulties you had – which may help improve your planning for future projects.
- Complete any funding accountability forms required.
- Report to your board/trustees etc – let them know the project outcome.
- Contact any relevant media who may be interested in the outcome of your project.
- Collect and file any newspaper clippings, photos etc
- Celebrate your success! Go out for a meal and acknowledge all your hard work as a team.

Information prepared by



### **LINKS / WHERE TO GO FOR MORE INFORMATION:**

[www.community.net.nz/how-toguides/\(section2\)](http://www.community.net.nz/how-toguides/(section2))  
[www.ganttchart.com](http://www.ganttchart.com)  
[www.exult.co.nz](http://www.exult.co.nz)

For more information or help you can also contact your local Community Development Planner at Venture Southland:  
143 Spey Street, Invercargill  
Ph: 03 211 1400  
[enquiry@venturesouthland.co.nz](mailto:enquiry@venturesouthland.co.nz)  
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