

I have also begun building a folder of evidence which I intend to use when I revalidate in three years time. It is a good habit to get into and also gives you an idea of how much CPD you do.

Personally my journey was extremely worthwhile, I learnt a lot, achieved a lot and the end result is I have become a Chartered Librarian and subsequently a Mentor. Both achievements which will undoubtedly further my career as a professional librarian.

Success in project management: an informative and practical workshop for those wanting to improve their project management skills

Report of the joint Health Libraries Group, Information for the Management of Healthcare and Libraries for Nursing study day held on 24th January 2008 at the University of Salford

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This was an excellent and well organised event with good speakers combining a mix of talks and workshops.

The speakers were Paul Waters from the University of Salford, Jacky Berry Librarian of the British Medical Association and Andrew Booth, Reader in Evidence Based Information Practice, Director of Information Resources and also Programme Director of FOLIO at the School of Health and Related Research (SchARR), University of Sheffield. Paul began the day with an overview of project management and later spoke about Prince2. Jacky spoke about the people aspect of project management

and Andrew spoke about the TQM (Time-Quality-Money) approach to project management. Each spoke from a different stand point but complemented each other reinforcing key points. Interestingly all the speakers used the image of a triangle to identify three important but related aspects of project management:

Paul – time, resources, quality.

Jacky – processes, practices, people (with people being the most important).

Andrew – TQM, not total quality management but - time, quality, money.

Paul in his introduction gave a useful overview of project management emphasising the importance of specifying goals and objectives (whatever the size of the project). Using a project management tool or methodology like Prince2 is only half the picture and does not necessarily guarantee success. Project management is both a science (principles, practices, techniques, processes) and an art (human touch - people management, communication and lots of common sense). This blend is crucial in ensuring that a successful outcome is achieved and that the goals and objectives are met.

Accountability and governance are also important, and the project manager's role with these aspects is vital.

Jacky Berry spoke next and gave an enthusiastic and fascinating overview of the importance of people and project management. She based her talk on the project she managed at the BMA library. Her brief gave her eleven months to achieve the project outcomes. She emphasised that project management often incorporates lots of stakeholders and can be messy. Unstructured and continuous change invariably occurs during a project thus making change management an important part of the project management process.

People are important and really count in the process of managing projects. Many projects, as at the BMA, involve numerous and varied groups of people and teams including the project manager (Jacky), stakeholders, library team, finance, human resources, estates, maintenance, porters, marketing, security, health and safety, events, designers, architects, contractors, electricians, removers etc.

Jacky covered a comprehensive range of the roles and skills a project manager must have.

The role of the project manager is to:

- Recognise the importance of the project to the organisation
- Identify the people both directly and indirectly involved
- Build relationships
- Understand the importance of people management
- Gain commitment from the project team
- Achieve performance against objectives
- Manage stress and panic
- Be an organiser

The skills required by a successful project manager are:

- Leadership and management skills
- Empathy and emotional intelligence
- Communication skills – both listening and hearing (it can go wrong)
- Ability to understand the needs of the different stakeholders
- Conflict management
- Interpersonal skills
- Enthusiasm
- Belief in positive attitude for the change
- Can do attitude
- Be flexible
- Be able to multi task
- Influencing and negotiating skills
- Decision making
- Ability to understand and deliver to time frames
- Knowledge of legal aspects such as health and safety and the DDA

Jacky went on to emphasize that delegation and teamwork are essential as one person cannot know and do everything (be a 'jack of all trades'). It is essential to make full use of the experiences and skills of your staff and also to believe in and trust them. Motivation of staff is important as they need to feel involved and have ownership of the process and the final outcome. Regular meetings are therefore useful – but do be

open and honest – and listen! Also do not be afraid to ask questions, but be decisive when necessary.

Do not try to run too quickly. Take time to look back and reflect to ensure that everyone is following. Work on building good relationships and take time to write a plan, including contingency plans. This means that if and when things go wrong there is then a structure in place to help cope with the crisis.

Jacky summed up her talk by stating that projects fail if the resources are not carefully managed and that includes the people.

Her final gems of advice included –

- Smile
- Keep calm
- Don't panic!

Andrew Booth then spoke about a 'TQM (Time-Quality-Money) approach to managing projects in health care'. Andrew commenced his talk by stating that any tool used is only a means to an end, helping to achieve the project goals. Always question assumptions in any tool or mechanism used and ensure they do not become an end in themselves. Andrew spoke from experience of managing numerous projects (at present he is involved in twenty projects - although not all as project manager!) Andrew described the time-quality-money triangle and how these interact and need to balance; if one of these changes the whole is affected. In the NHS there tends to be concentration on money and quality is less of a priority (though he stated that the National Service Frameworks are attempting to counteract this).

Time is important in project planning and implementation and how time is used needs to be planned. Lead in time must be planned into the project plan as staff may require training or preparatory work undertaken. Time for evaluation and reflection must also be built in. Andrew suggested setting a deadline earlier than needed to allow for slippage and then to plan backwards to the present. Include planning for internal

and external milestones, programme meetings (which should be regular) etc. Flexibility is important though – be prepared to 'telescope' timescales and change things around where gaps appear. Make use of tools like Gantt Charts to build in timescales and check points throughout the project – they are crucial and help in maintaining quality during the project.

Discuss the progress so far, both the good and the bad, with commissioners as you go along and clarify expectations such as '... if we are to do...., we need you to do...etc. Honesty and clarity are vital especially regarding external constraints e.g. non supply of goods or services expected at a particular time. Progress reports should be meaningful and look at where you want to get to and what is needed to help achieve the goals.

Quality came next. Ensure expectations are made explicit and are SMART. This shows how much effort to put into the project (but do watch for 'scope creep' – while doing one thing... can do... - things can often grow beyond the original remit and plan).

Then finance was covered. A budget proposal must be incorporated into the project plan including –

- Fixed costs – infrastructure, staff etc.
- Variable costs – consultancy etc.
- Inflation / pay increases
- VAT / Overheads
- Time – staff training, dissemination etc.

Review finances and expenditure on a monthly basis (both the actual and committed expenditure – e.g. make use of a budget spreadsheet) and redirect under spends to other parts of the project. Be open and honest about changes in the budget which could not be anticipated and were outside of your control.

Andrew emphasised the importance of considering time, quality and money together throughout the project. Evaluation is crucial and should be planned in from the start, including what data is needed and who is responsible for this. Any management tool used must identify problems or potential problems which can then be solved by the resources of your team.

Contingency planning will be needed in case of problems. This could include going over time which may result in needing to delegate, pay overtime, change methods to achieve the outcome e.g. telephone interviews instead of questionnaires, redeploying staff from elsewhere, redistributing roles and responsibilities, rollover into a new phase or renegotiation with stakeholders and commissioners. Lack of quality may require more experienced staff to be used, revision of customer expectations, prototyping, modelling or piloting plus a change in project documentation to reflect the changes from the plan and likely implications. If there is an overspend on money then there may need to be a substitution, for example someone on a lower pay scale undertake certain jobs, subsidise from other resources, combine with another project (economies of scale) or if no other option agree to designate the project as a loss leader.

Andrew ended by stating that projects sometimes do fail because of one or more of the following:

- Lack of commitment / understanding from commissioners
- Misalignment of the project with the organisational objectives
- Seduction by new technology
- Failure to secure appropriate quantity / level of staff resources
- Incomplete project scope lacking a clear definition of the benefits and outcomes of the project
- Lack of project planning
- Mismatch between costs and benefits
- Lack of funding and incorrect budgeting to meet the expectations
- Absence of appropriate project management techniques
- Lack of knowledge transfer of lessons that have been learnt

The last presentation of the morning was from Paul Waters who talked about the PRINCE2 (Projects in Controlled Environments version 2) project management system. This system is used at the University of Salford and offers a structured approach to managing projects. Prince2 covers the management, organisation and control of projects of varying shapes and sizes. It is process based and includes inputs, outputs and

objectives and is staged allowing for control, definition, flexibility and monitoring. It has been around for some years and is based on methodology from the 1970's.

It is quite an involved methodology and the session was only able to cover the basics. Paul showed us some very complicated and mind boggling but very pretty coloured diagrams on the process and structure of Prince2 and then thankfully simplified it which made a lot more sense!

Paul emphasised that basically any project management approach needs to be structured but simple and appropriate to the situation. Remember it is the process of project management and achievement of the goals that is important not the tools or methods used.

Prince2 can be split into six areas or sections;

- Project governance
- Project initiation
- Project execution
- Project closure
- Risk management
- Project planning

The planning process is crucial and must include milestones and checkpoints to monitor progress. Celebrate mini targets as this helps to keep staff motivated and engaged. In the plan include timings, deadlines, sequences and responsibilities (who will do what and by when) for all parts of the project. Monitor for slippage on timings and factor in lead in and set up time – do not jump in at the deep end as things can go wrong from the start. Likewise the end and closure of the project is important. Evaluation must take place to ensure that the objectives were achieved and allow for reflection on both successes and failures and where improvements could have been made. It is essential to learn lessons for the future. Finally project governance, which includes the board, manager and team, is important, but the board must not be too large otherwise decision making will be difficult. Within this risk management is important - keep a risk log (review and add to it as you go along) and include:

- R Risks
- A Assumptions
- I Issues
- D Dependencies

For example if you are using an external company or supplier then think about whether they are solvent, or are there any discrepancies between certain tasks in the project.

Again as the other speakers emphasised – good communication is central and crucial in project management. For a project to succeed communication must be right throughout the process from start to finish. Always think about what you should be communicating, to whom, in what format and when throughout the project – basically communication needs a plan to make it effective! Finally remember to use a project management method that is best for you and do not just use tools like Prince2 or a Gantt chart just for the sake of it – they will not automatically mean success.

Workshop reports

PRINCE2: A practical introduction by Paul Waters

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While I had seen and heard PRINCE2 mentioned throughout my recent working life I knew very little about it and decided it was about time I had a basic understanding of the principles of this approach. Following his introductory presentation in the morning, the afternoon workshop by Paul Waters offered an opportunity for participants to look in further detail at the PRINCE2 approach to project management, share experiences about project management and look at possible practical ways in which a PRINCE2 approach could have overcome or anticipated difficulties. Paul passed around large scale copies of the intimidating looking PRINCE2 process model, simplified it

and took us through each of the main stages in detail, from project briefs and initiation, execution through to completion using real life examples. The key elements running through the life of a project of appropriate governance, check points, risk management and planning were also discussed and example projection initiation documents were examined. Paul's CD of further examples such as project initiation documents, risk registers and sample project briefs was a useful extra. It was a useful session which enabled us to quiz an experienced project manager about our own experience as part of faltering projects and gain an insight into what might have gone wrong in the past. It gave participants a basic understanding of a popular structured approach to project management that armed me with enough detail to approach the planning of a project with greater confidence by using a pragmatic version of a previously mysterious tool.

Project Management: Workshop 'Planning a project – staffing, timing, costings. FOLIO team

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The Study Day organised by the HLG, IFMH and LfN was a particularly well-organised event, at which all the speakers held the attention of their audience and inspired a number of questions and a great deal of discussion. The morning went by very quickly with several extremely interesting presentations. I had chosen to attend the 'Planning a project' session in the afternoon, and was very pleased that I had done so as I took away many useful practical tips. The group work was led by Anthea Sutton and Diana Papaioannou from the FOLIO team, who took us through the various aspects involved in planning a

project; staffing, timing and costings. This was carried out in a very thought-provoking way. After a short presentation to outline the project we would be working on, the group was divided into teams and each given the task of developing one aspect of the plan. One group looked at human resource requirements, another at costing requirements, and the third (my group) was assigned to time requirements. We were told how much time we had overall to develop a Web portal to provide health and social care managers in a city in the East Midlands with access to local ward profiles. The teams were given a budget with salary allowances, as well as a list of likely costs for consumables such as computers and software, and a list of the activities that would need to take place to deliver the project. As I was involved in this latter activity, I can report that we did feel somewhat constrained by the fact that we were instructed that the list had to happen in the specified order, but that we were in agreement as to the changes we would have made to the list had we been working on the project for real, so it was a very harmonious group! When it was time to report back to the rest of the participants, it was very interesting to hear how the others had dealt with their parts of the project. What came through very strongly was the fact that it's very necessary for everyone participating in a project to work closely together if it is to be successful. A very worthwhile day!

The Perfect Project Manager

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The afternoon of the Success in Project Management study day gave us the opportunity to break into work groups. I chose the option '**People and Project Management**' run by Jacky Berry, Librarian at the BMA. Jacky had earlier given a presentation about her involvement in the BMA library makeover, and we started by each introducing ourselves and the projects we were currently involved in or planned to be involved in.

As we worked around the group and discussed some of the difficulties we were facing, it was clear that the issues being

raised had been experienced by many and very quickly a supportive dialogue was in place. Jacky herself was very generous in providing details of what had worked and what had not in her project, and this provided a forum for exploring possible solutions for our own specific scenarios.



Jacky then asked us to list the attributes and qualities of the 'Perfect Project Manager' (PPM) which was long and pretty exhaustive and we then had to create a pictorial representation of this perfect person! This reinforced the learning from the morning presentations but gave us the opportunity to laugh at ourselves and realise that there was quite a goal to be attained in being a PPM!

The Perfect Project Manager (brainy, a good listener and juggler; able to multi-skill; broad shouldered and caring; able to turn off after a day at work!)

The group were then presented with Good Luck cards and asked to address these to themselves with a reminder of what had been learned or what they planned to do next, which Jacky posted to us a month later.

The session provided an invaluable opportunity to meet people facing like challenges, find space to look beyond our own projects, whilst reinforcing my own belief that the most important element in the success of any project is its people.