

# Practical Project Management

for voluntary organisations

Elizabeth Gray-King



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Published by the Directory of Social Change (Registered Charity no. 800517 in England and Wales)

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Print and digital editions first published 2021

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ISBN 978 1 78482 047 3 (print edition)

ISBN 978 1 78482 048 0 (digital edition)

### **British Library Cataloguing in Publication Data**

A catalogue record for this book is available from the British Library

Cover and text design by Kate Griffith

Typeset by Marlinzo Services, Frome







Printed and bound in the UK by Page Bros, Norwich



*For my Pete and  
the social benefit sector he loves.*



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# About the author

Elizabeth Gray-King describes herself as a ‘curly-headed combination of artist, project manager and theologian, habit-bound to find peace in complexity’. She has more than 30 years’ experience of managing social benefit projects in churches, local communities, local authorities and national organisations. She has a BA in Fine Arts (George Washington University, Washington DC), an MEd/PGDip in Professional Development (Westminster College, Oxford) and a Certificate of Theology (Mansfield College, Oxford).

Since 1975, Elizabeth has worked as a professional, independent, commissioned artist and as a visual theologian. She is a painter and illustrator, and has acted as artist in residence at theological conferences, where she produces images that reflect what she hears. She has created artworks commissioned by various organisations, illustrations for books and websites, and paintings and drawings as organisational gifts. As a worship installation artist, she made temporary theatre-sized artwork to enhance worship spaces and events. She is the official illustrator for *Appreciating Church* (see [appreciating.church/our-illustrator](#)). In her art, Elizabeth creates images that offer the sense of a calm centre that can be found within complicated theological or social issues.

Since 1999, Elizabeth has been the Director, Principal Consultant and Research Designer for Gray-King & Gray Ltd (GKG), which she co-founded with her husband, Peter Gray. GKG offers guidance, training, research and project management services to organisations within the social benefit sector. In this capacity, Elizabeth leads courses on project management for the Directory of Social Change (DSC).

Elizabeth was ordained as a United Reformed Church (URC) minister in 1988 and, since 2004, has worked in a number of wider roles for the URC, including as a co-ordinator, training developer and workshop leader, as well as in the role of Education and Learning Programme Officer since 2013. She also acts as an interim project manager within the sector, scoping new projects to pass on to permanent staff or giving shape to chaotic projects. In her role as a pastoral minister, Elizabeth was minister of Temple Cowley United Reformed Church in Oxford from 1988 to 1999. There she established the Oxford Healthy Living Centre and was Chair of the District Pastoral Committee. From 1989 to 1994 she was on hand for students and staff at Oxford Brookes University as a volunteer chaplain in the Chaplaincy Team and from 2001 to 2007, she was a Non-Stipendiary Oversight Minister at the Brill United Reformed Church.

Elizabeth’s other voluntary positions include co-creator and then Chair of Milton Keynes Society of Artists (1980–1985); Governor and then Chair of Governors at Temple Cowley Middle School (1989–2001); Chair of East Oxford Healthy Living Initiatives (1998–2007); Non-Executive Director, Chair of the Communication and Public Involvement Group, and Chair of the Finance Committee at Oxford City Primary Care Trust (2001–2007); and Chair of the Oxford Social Enterprise Forum (2005–2008).

Elizabeth has written on a wide range of subjects including patient and public involvement, risk management, project management and theological texts, comprising liturgies, devotions and reflections. Her published works include *Risk Management* (DSC, 2009); *When Loss is Liberation: Experiences of loss* (URC, 2006) and ‘Liturgies’ in *A Lifetime of Blessings* (Geoffrey Duncan, ed., 2000, Canterbury Press).



# Acknowledgements

I am shocked that I wrote this book and can only happily blame it on Annette Lewis, DSC's Director of Sales and Services. Over coffee a number of years ago, she convinced me that it had to be written. I am in her debt. Having my first draft accepted, it has become what it is thanks to the extraordinarily patient and questioning work of my editor, Lucy Muir-Smith. Becoming a little Lucy in my brain, she dug away at what has spilled its way into all of my work and training but was very hard to extract for the book. She helped me articulate what I knew so deeply that I forgot to explain it.

I thank my peer reviewers, Jane and Simon Berry of ColaLife, with whom I have worked for years on social change projects. They provided invaluable feedback on the manuscript and helped me to be even more clear. I am grateful to all those who contributed case studies for sharing their very real experiences, many of which have been anonymised. Finally, I thank my dear business partner, mentor, friend and husband, Pete Gray, for listening, reading, challenging and supporting me to extend my visual vocabulary to verbal vocabulary.

Without this amazing team, there would be no *Practical Project Management* book. Thank you.

**Elizabeth Gray-King, January 2021**



The author and publisher would also like to thank:

- Annette Lewis, Director of Sales and Services at DSC, for her quote in chapter 2;
- Cathy Shimmin, Senior Training Manager and Performance Coach at DSC, for her contribution of the case study in chapter 2;
- all the creators of the Appreciative Inquiry 4-D cycle model, reproduced in chapter 3;
- Miguel Á. Padriñán for his photographs from Pexels, which formed the basis for a number of sticky note images in figures 3.7, 4.1, 4.2, 4.3 and 4.4 ([www.pexels.com/photo/white-paper-1111367/](https://www.pexels.com/photo/white-paper-1111367/), [www.pexels.com/photo/pink-background-with-speech-bubble-1111369/](https://www.pexels.com/photo/pink-background-with-speech-bubble-1111369/) and [www.pexels.com/photo/white-quote-paper-cutout-1111370/](https://www.pexels.com/photo/white-quote-paper-cutout-1111370/));
- the developers of GanttProject for the freedom to reproduce figure 4.6 under the GNU General Public License v. 3;
- Martin Bates for casting his numerical eye over figures 5.1 and 5.2;
- the creator of the Iron Triangle concept, Martin Barnes (chapter 5);
- the Charity Commission for its risk matrix, reproduced and adapted in chapter 6;
- Gabi Zagnojute, Editorial Manager at DSC, for her case study in chapter 7;
- Simon Peters, Walking the Way Project Manager at The United Reformed Church, for his quote in chapter 9;
- Tom Traynor, Head of Research at DSC, for casting his technical eye over chapter 12.

Finally, we are grateful to Martin Cooper of Marlinzo Services for his typesetting expertise and perseverance in creating some particularly complicated figures for the book.



# Foreword

VUCA is an acronym that stands for volatility, uncertainty, complexity and ambiguity – a combination of qualities that, taken together, characterise the nature of difficult conditions and situations. We have experienced such circumstances during 2020 and 2021. For the great majority of organisations and for those who work in and are supported by them, Covid-19 has changed so much in their roles and in the society in which they operate. So much of the world of work and the wider environment feels out of our control. As a result, the need for excellent management frameworks and tools has never been greater. More than ever, we must put the training and development of our people first and place core skills at the heart of our organisations to ensure we are strong and robust enough to face this challenging world.

In their suite of management tools, however, social benefit organisations can forget the key role of project management and how it can bring teams together during difficult times. In my experience, the vital set of skills that experienced project managers have is regularly overlooked across the sector and many organisations become unstuck not having this knowledge in house. The pressure to drive cost savings through organisations and manage in shifting sands means that short-term solutions rather than strategic approaches often become the focus. By contrast, when project management expertise is prioritised, an organisation can fly! Projects get delivered on time and within budget. High levels of collaboration are fostered inside and between organisations. Risks are minimised and mitigated, not leaving you exposed. You drive efficiencies by reviewing and learning from a project as it unfolds. You feel the satisfaction of leaving a legacy and of a job well done and, ultimately, you achieve a deeper understanding of your business. It's for these reasons that all organisations should include project management in their skills audit and really assess whether they are able to deliver this function.

*Practical Project Management* is an indispensable handbook for helping organisations to realise all of these benefits. It guides the reader, as project manager, through the lifetime of a project from preparation to its close, providing all the strategies and tools they will need to deliver successful projects. It explains how to lay out a project's goal, manage stakeholders, identify and schedule tasks, cost a project, manage risks, monitor tasks, carry out reporting and evaluations, and close a project effectively. *Practical Project Management* is an essential addition to any modern group or organisation, from those running multiple projects in very complex environments to those aiming to take a more planned and effective approach to their everyday work.

I have worked with Elizabeth Gray-King for the last 20 years, utilising her skills and expertise in a variety of ways across infrastructure, national, regional and local organisations. My team and I have benefitted from her excellent in-house training programmes and online tools and materials, which have helped us ensure we have the right skill sets. We have also endeavoured to spread her expertise across the sector in our interactions with others. My hope is that the publication of this book will disseminate her knowledge further so that as many organisations and individuals are empowered to create the greatest impact they can for their beneficiaries.

We look to the future knowing that the world continues to be chaotic and constantly changing. We must control what we can. Within the messy expectations of social benefit projects, *Practical Project Management* helps guide us along a reassuring path towards clear outcomes.

**Helen Rice, Chief Executive**  
**Age UK West Sussex, Brighton and Hove**



# About the Directory of Social Change

At the Directory of Social Change (DSC), we believe that the world is made better by people coming together to serve their communities and each other. For us, an independent voluntary sector is at the heart of that social change and we exist to support charities, voluntary organisations and community groups in the work they do. Our role is to:

- **provide practical information** on a range of topics from fundraising to project management in both our printed publications and e-books;
- **offer training** through public courses, events and in-house services;
- **research funders** and maintain a subscription database, *Funds Online*, with details on funding from grant-making charities, companies and government sources;
- **offer bespoke research** to voluntary sector organisations in order to evaluate projects, identify new opportunities and help make sense of existing data;
- **stimulate debate and campaign** on key issues that affect the voluntary sector, particularly to champion the concerns of smaller charities.

We are a registered charity ourselves but we self-fund most of our work. We charge for services, but cross-subsidise those which charities particularly need and cannot easily afford.

Visit our website **[www.dsc.org.uk](http://www.dsc.org.uk)** to see how we can help you to help others and have a look at **[www.fundsonline.org.uk](http://www.fundsonline.org.uk)** to see how DSC could improve your fundraising. Alternatively, call our friendly team at **020 4526 5995** to chat about your needs or drop us a line at **[cs@dsc.org.uk](mailto:cs@dsc.org.uk)**.



# Introduction

I come to this book with 30 years' experience of managing and supporting social benefit projects in churches, local communities, local authorities and national organisations. Having also taught practical project management courses for over ten years, I have often felt the frustration of dedicated people, as they face what often feels like overwhelming questions: how do you manage a project on a shoestring *and* change lives? Must you remove passion to focus on the seemingly head-only exercise of project management?

These questions highlight the fact that social benefit organisations and profit-orientated companies have different focuses. While it is not unusual for companies to consider shareholder demand to be an appropriate business driver, social benefit organisations exist to make positive social change. This might be to help people improve their own lives, to help improve the environment or to support stronger communities. And, in our increasingly complex world, this might be to fill public sector gaps by delivering key local services.

*Practical Project Management* aims to show that, rather than removing a sense of social-driven purpose, project management is the body that supports the beating heart of a project. And, just as a heart cannot function on its own, passion alone cannot make a project effective. In this way, a project management framework helps channel the passion of a social project into a structure which encourages minds to focus and objectives to be achieved. So, project management methods, which make the intended outcome, intended outputs and benefits of projects clear, as well as the process for achieving them, cause social benefit organisations to be more robust and therefore more able to deliver and illuminate the changes they want to make. (See the following box and page 33 for the definitions of outcome and outputs.) This is especially important given that social benefit organisations need to demonstrate that they are using their hard-won donations and funding effectively.

## **Social benefit organisations** include:

- registered charities, including charitable incorporated organisations and charitable companies;
- unregistered charities, such as universities and housing associations;
- other organisations that are not registered as charities but have social benefit aims, such as community interest companies;
- public sector organisations, such as local authorities and government agencies.

## Quick guide to terms used in the book

The following terms will be explained in greater detail in the sections noted:

- **Outcome.** The outcome of a project is the change or overall result a completed project has achieved. (For further details on this and the following three terms, see 'Project management terminology: outcome and outputs' on page 33.)
- **Intended outcome.** The outcome reworded as the purpose of the project – the final point the project is aiming to reach.
- **Outputs.** Outputs are the observable, measurable results or changes the completed project has created, including its finished activities and/or products.
- **Intended outputs.** Intended outputs are specific areas of work that have been designed to achieve the intended outcome.
- **Milestones.** A milestone is the conclusion of a range of activities that are known as dependencies. (For further details on milestones, see page 68.)
- **Dependencies.** A dependency is a task that must be completed in order to achieve a milestone (see page 71).
- The **context chart** is this book's recommended one-page project summary that includes the intended outcome, stakeholders, finance, resources and intended output information (see page 49).
- **Project plan.** The project plan collects crucial elements of a project in one place, including the context chart, Gantt charts and risk management plan (see page 55).

It is clear that social benefit organisations need project management frameworks and methods. However, since project management training and information is mostly targeted at profit-orientated companies, organisations often struggle to find appropriate and tailored information to facilitate their work. This book aims to fill that gap by showing you how to use tried and tested project management principles and tools to support your social organisation to meet its vision and mission.

Written in straightforward language, *Practical Project Management* aims to be a down-to-earth and pragmatic book that cuts through project management mystique by revealing the simple principles behind the complex terminology. It shows you how to:

- get started, including how to place your project in the context of your organisation and the sector;
- create and analyse tasks, and how to schedule them;
- link a project's budget to its outcome to prove the project's value and social benefit, and how to cope with shoestring budgets;
- manage a project day to day to keep it on track and to close it well;
- use the evaluation process as a project management tool for demonstrating social change;
- support decision makers, workers and beneficiaries;
- delegate effectively.

It is important to note that this book describes how to manage a project which has already been scoped and agreed. This means that the people who proposed the project will have spent time researching and defining need, making a case for the project, going through consultations with stakeholders, agreeing and documenting the project's overall objectives and limits, and securing approval from decision makers, such as trustees. A



funding application may have been written and proved successful and other resources may have been gathered. It is at this stage when the project will be delegated to you, as the project manager, to manage – and this is the point at which you will need this book.

## A fictional project: the lunch club

To help demonstrate the principles outlined in this book, you will notice a story running through the chapters – a lunch club project run by a fictional charity called **Larkhill Rising**. The intended beneficiaries for the lunch club project are **people experiencing homelessness in the Larkhill area**.

This example includes fictitious stakeholders, such as the **Back Road Café** – a community development project that achieves its charitable aims via its café. It attracts conventional customers but primarily exists to serve people in the deprived local area. Its aims coincide with those of Larkhill Rising, and so the café is one of the project's main partners.

Local residents who spend much of their time in the café are also stakeholders in the lunch club project. Some of them become actively involved in the project's activities and take on various tasks to help the project achieve its intended outcome. One example in the book describes regular café users receiving training to have conversations with the lunch club's beneficiaries. This training and experience, in turn, contributes to the café's charitable aims, including allowing local residents to learn new skills and gain greater confidence.

One of the project's intended outputs is 'To share information to deal with homelessness issues' (see number 6 in figure 4.8 on page 85). This involves communicating information that has been learned about the beneficiary group with stakeholder organisations that will better equip them to make a positive impact on the lives of people experiencing homelessness.

Two of the main tasks for achieving this intended output, as listed in figure 4.8, are 'Secure a partner-support-staff champion' and 'Inform homelessness companions'. A **partner-support-staff champion** is a delivery partner from social services who communicates the learning points from the lunch club to stakeholder organisations to let them know what really helps people who are experiencing homelessness to change their lives. **Homelessness companions** have personal experience of homelessness and are best equipped to offer peer support to people currently experiencing homelessness. They are also part of the community of people who attend, and have been helped by, the café. The task of informing homelessness companions involves giving them information on what has been learned during the project's data-collection process with the beneficiary group. The aim of this is to further equip the homelessness companions to help the project's beneficiaries.

The lunch club story features a few real organisations, such as Citizens Advice and Awards for All.

If you are new to project management, I hope *Practical Project Management* will shed light on a new discipline for you. If you have managed projects without having been trained in the discipline, I hope this book will help you affirm what you already know and add to your skill set.



# Chapter one

# **Project management**

This chapter explains what project management is and what programmes are as compared to projects. It details what a project manager does and who a project manager is likely to be. This chapter also offers a summary of the most common project management approaches, frameworks and methods and provides some high-level information about project tools.

## **What is project management and why use this approach?**

Project management is the hidden structure, or framework, behind a thriving project. A project management framework helps you to clarify projects, show how they'll be delivered and see how to make changes when needed. It helps you to define the why, what, who, when and how much, and show how your project made any difference. It establishes the control that is required over the complex variety of information and actions to make a project work.

Project management's core discipline is that of planning before activities begin so that you can manage changes easily when the project starts. An often-used time management principle is 'do it now'. The project management principle is 'plan it now', then do it at the most effective time.

A project management framework employs tools and templates to help you to gather and disseminate information clearly, allowing you to channel overflowing ideas into logical plans, and to gather collected knowledge into understandable, transparent processes and for all of this information to be stored properly. It helps you to create multi-layered plans that allow you to zoom in and out of a project, seeing the big picture while knowing all its details intimately.

A good project management framework allows you to keep an informed, practical hold on all aspects of a project while offering the flexibility you need to deal with changes and unexpected events. The result of good project management is that your organisation's purposes are more likely to be met and risks to managers are reduced. A project management approach can be applied usefully to tasks that might not normally be treated as projects within organisations. The following case study features a common organisational task – the annual audit – which benefitted from using the type of framework that this book illustrates.





## Case study: using a project management approach to take control of a recurring organisational task

Sarah, the finance director of a large UK charity, came to its annual audit. In previous years, she had managed the process using a string of to-do lists, mostly in response to the auditor's need for information. This year, Sarah chose to take a project management approach, deciding that the audit should be best used to meet the needs of the charity rather than the demands of the auditors.

She initiated a thorough analysis of how a successful audit could meet the charity's needs in terms of ensuring that the charity led on who would be consulted and when, as opposed to people being requisitioned by auditors to answer questions without warning. The finance team listed who the important people around the audit were, from internal staff to external agencies. They studied and reserved the required resources, and they made a clear list of the overall action areas to get the audit done. They then broke down the action areas to create their familiar to-do lists yet expanded the lists by applying a real-time delivery schedule to the work. They discovered and planned for the risks that could arise between the start of the audit and its completion, and they planned their communications with the auditors and the charity directors.

Sarah was amazed. The time she and her team spent to thoroughly plan ahead reaped unexpected rewards. The audit itself went more quickly than they expected. People who had in the past complained that they were left out of the audit process, or pulled in too quickly, were more sure about their role in it. The charity directors did not have to collaborate with the finance team in a last-minute flurry to complete the audit. For the first time in Sarah's memory, the meetings with the external auditors were driven by the charity and the finance team members weren't worried about what they might suddenly be asked. The charity received a far more thorough financial picture than anticipated and, quite unexpectedly, gained strong information to feed into the planned restructuring for the charity.

Clearly an annual audit is not as large a project as a housing association's new build (for example), but a project management approach and its tools can support any size of project to be as effective as possible. Most importantly, a project management approach can ensure that social benefit organisations maintain control over projects of any size rather than letting an entity control things for them.

## What is a project?

A project is a well-defined set of activities which end with a specific accomplishment. Projects have tasks with distinct start and finish dates, defined resources and clear staff allocation. They might be set up as a way to deliver a project for which charitable funding has been raised, to test new ideas or methods of delivering services, or to carry out a specific task, such as a major evaluation.



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ISBN 978-1-78482-048-0



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