PROJECT MANAGEMENT HANDBOOK

How we make new stuff happen

Claire House
CHILDREN'S HOSPICE

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INTRODUCTION

One of our biggest assets at Claire House is our team and their passion for our vision. Achieving our vision means that things are constantly changing. Our staff have told us that coordination, engagement, support and guidance are really important when it comes to agreeing and implementing change, without taking away enthusiasm and innovation. Project management is a key part of this.

We have developed an approach to project management by listening to staff and designing a way of doing things that fits with our values. Our approach is not set in stone, it will adapt as we test and learn. We will also provide training and support along the way.

❝ Our project management toolkit will make a massive difference to Claire House and therefore the children and families we're here to help. For years, colleagues have been asking me "how do I get stuff done at Claire House?" and finally we've got it written down. Not just that, we now have the support in place (tools and brilliant people) which will mean that our work is more likely to be successful, and more fun too. ❞

DAVID PASTOR, CEO

About this Handbook

This handbook is designed to provide a step-by-step guide to project management at Claire House, from an initial idea forming, to closing a project and sharing the learning. If you need any help or support, please contact the Project Management Office (projects@clairehouse.org.uk).

Project Management Language

Project management has its own language. Whilst we know we are not a business; we have decided to use recognised terms to make it easier when working with external partners and to facilitate internal learning of best practice. We have developed a glossary (see p21) of key terms to help support this, however some of the headline terms are also explained in the next couple of pages.

What is Project Management?

When we embark on change, we want to make things better. Making a change is often complicated and can be difficult. Project management provides a way to organise work, make success more likely and helps to demonstrate the difference the change has made.

Managing projects well ensures that the right people are involved at the right time, and that the reasons for commencing a project are achieved and remembered. Good project management also helps Claire House to make the most of our time and resources, and to strategically work towards our vision and mission.

One of our biggest assets at Claire House is our workforce. This handbook is designed to help the Claire House team by providing clarity, transparency and appropriate ownership in relation to projects and change, as well as reducing duplication and improving communications (i.e. removing guesswork or surprise to other departments or stakeholders who may be impacted by our work).

> " Using project management methods has helped us improve communications and collaboration among Income Generation, Comms, the Care teams and external partners. They enhance creativity and innovation by fostering a positive and supportive group. They reduce risks and uncertainties by identifying and mitigating potential issues, as well as helping get buy-in. "
>
> **VICKY MCKELLAR, FUNDRAISING**

What is a project?

Projects invoke a change, deliver something new and have defined start and end dates. They can vary in size and complexity from small day-to-day improvements to large transformational change which may comprise a number of projects to make up a 'Programme'.

All projects aim to deliver against a brief and have assigned roles, responsibilities, governance and budget.

Projects are different from day-to-day, routine work, although on occasion, a big activity like planning an event will benefit from using project management tools.

How does Project Management work at Claire House?

At Claire House we categorise our projects depending on how complicated and risky they are. The riskier or more complex a project is, the more management and oversight is needed to ensure a project remains on track and doesn't drift.

At the start of any project, we assess which tier a project falls into by evaluating it on the known risks, opportunities, complexity, size, its strategic importance and the ability for Claire House to deliver the project (time, cost and quality). This defines what support and resources will be required, the project management tools needed, and what oversight or 'governance' the project will have. Oversight ensures that all change in Claire House is centrally coordinated and allows us to see the bigger picture of what we are planning to do to achieve our goals without over committing ourselves.

> " I find clear guidelines for project management really helpful. I often start a project, look at research and feel lost and overwhelmed. Clear tasks and guidelines are really helpful to start a project and keep it flowing. Using tools to support the project and to evaluate what has been achieved and what is required at each stage keeps me on track and able to follow the project through. "
>
> **CLAIRE JONES, CARE**

No one has to set out on the project management journey on their own. We have invested in developing a 'Project Management Office' (a team that helps provide support to projects and change), an easy-to-follow Project Management Handbook, access to training, and a range of tools and other resources to help everyone learn more about how to manage or contribute to projects.

Projects will be categorised into one of three project 'Tiers', or be defined as 'Business as Usual' (BAU):

TIER 1	TIER 2	TIER 3	BUSINESS AS USUAL
very large in scope, size and risk and are ambitiously strategic.	operationally large and involve multiple teams.	smaller but often being done for the first time, before becoming BAU if repeated in the future.	

How do I know if something is a project or just part of my job (BAU)?

If you have a new problem, opportunity or idea that will require resource (this could be financial, skills and/or experience) from across the organisation, it is highly likely that this is a project that should be categorised and follow 'The Project Process' outlined in this handbook.

Work which is likely to be classed as BAU rather than a project will meet most of the points below:

- The idea does not go beyond your immediate team and doesn't involve changes that impact other departments. Pre Project tools have been developed to help you consider who may be impacted and/ or who needs to be involved with a potential new project.
- The idea doesn't involve any changes to systems, data or working processes and is not expected to create additional work to people outside of the originating team.

- The idea stays within departmental budget and departmental objectives.
- The idea is something that has been done before and we are used to delivering.
- The idea is part of the 'day job' in line with job/role descriptions and expectations.

It's important to consider the work of some departments (such as the Events team) is 'project heavy' in nature. We encourage these teams to incorporate project management best practice into their usual ways of working, rather than classifying everything they usually do as a project. However, there may be occasions when these teams also require organisational project management resource (as set out in this handbook) to support their work. For example, if they are introducing something brand new, something significant in scale, or if additional skills and experience would be beneficial. In this case, 'The Project Process' in this handbook should be followed.

PROJECT GOVERNANCE

Why is it important?

Governance is an important part of how we do things at Claire House. It also forms a key part of our Care Quality Commission (CQC) rating and is required by many funders. Governance is about setting direction, roles and responsibilities, making decisions, and overseeing delivery.

In managing change, governance helps us to:

- Prioritise the right projects, ensure they contribute to our strategy and make the best use of our resources.
- Hold projects accountable for delivery, manage issues risks and dependencies, ensure we are doing the right kind of change and involving the right people in our work.
- Helps people do their best work. By having an appropriate governance structure, this means that the right people are making the right decisions and there is a clear way to escalate project issues or decisions.

How does tiering link to project governance?

Tiering is the first step in determining the appropriate governance for a project. This helps us to agree the right level of oversight for proposed projects, enabling us to make the best use of our resources and keep on track to deliver our vision and mission. Different tiers require different levels of oversight, so that what we apply is proportionate to the scale of the change.

The next few pages will describe how projects are tiered and then outline the steps and documentation involved in delivering a project for each tier.

THE PROJECT PROCESS
(AN OVERVIEW)

This is a summary of the steps involved in our project management process. It shows the key activities, who is responsible for decision making, documentation required for each tier and who is involved. You will find greater detail and guidance on each of the steps throughout this handbook.

Approval... time to ensure Claire House can support your change.

Tier 3:
- Your Light Business Case is reviewed (by Departmental Leadership).

Tier 1 & 2:
- The Business Case is reviewed (by ELT).

Tier 1, 2 & 3:
- YOU will get an email letting you know whether your project has approval to proceed to 'Planning'.

Implementation... time to put the plan into action.

Tier 3:
- YOU and the project team will maintain the Light Project Plan.

Tier 1 & 2:
- A Project Manager will maintain the Project Plan.

Tier 1, 2 & 3:
- Project Status Reports will be completed and shared as agreed.

1 PRE PROJECT	2 APPROVAL	3 PLANNING	4 IMPLEMENTATION	5 CLOSE

BUSINESS AS USUAL

Pre Project... time to get real clarity about what you are trying to do.

Tier 1, 2 & 3:
- YOU will complete an Idea outline and send it to **projects@clairehouse.org.uk**.

Tier 3:
- Your Idea Outline will get a quick Yes / No decision (from Departmental Leadership).
- YOU will complete a Light Business Case with support from a Project Champion.

Tier 1 & 2:
- Your Idea Outline will get a quick Yes / No decision (from ELT).
- A Project Manager will lead the development of a Business Case with your support and expertise.

Planning... time to detail what is happening, when its happening and who's involved.

Tier 3:
- YOU will develop the Light Project Plan with support from a Project Champion.

Tier 1 & 2:
- A Project Manager will lead the development of a Project Initiation Document (PID).
- A Project Manager will start to develop the Project Plan.

Tier 1, 2 & 3:
- Roles and responsibilities will be detailed in the planning documents and communicated with everyone involved.

Close... time to review, capture lessons learnt and handover to BAU.

Tier 3:
- YOU will complete the Light Project Close Report with the project team and send to **projects@clairehouse.org.uk**

Tier 1 & 2:
- A Project Manager will complete the Project Close Report with the project team.

Congratulations you did it!

THE PROJECT PROCESS:
STEP 1 – PRE PROJECT

What happens in the Pre Project step?

In the Pre Project stage:

- An **Idea Outline** will be drafted, which includes completion of the short project tiering checklist.
- Once this document has been completed it will go forward for a decision on which tier it falls into and then whether the idea should be further developed into a **Business Case**.
- For projects that score as a Tier 1 or 2, Executive Leadership Team (ELT) will make this decision, and if the project is given the 'go ahead' to be developed further.

- A Project Manager will support the development of a **Business Case** to take back to ELT for full approval.
- For projects that score as a Tier 3, your department's leadership group member will make a decision if the project should be further developed, and they will support you in producing a **Light Business Case**.

Project Tiering:

Why do we tier projects?

To best support and manage projects across Claire House we categorise them as Tier 1, Tier 2, Tier 3 or BAU based on factors including the nature of the activity, the level of resource and support required, and the level of risk. This means we can identify the appropriate resource, governance and oversight arrangements needed to effectively and efficiently manage our projects. It also helps us decide how many projects Claire House can reasonably run at a given time, based on their scale.

Initial 'tiering' is done at pre project stage with the assistance of the **tiering checklist**. A member of the Project Management Office and/or a line manager can support this. Later, at approval stage, the ELT will review and verify all potential Tier 1 and Tier 2 projects and, where necessary, decide which projects to prioritise to best achieve our vision and strategic objectives.

How do we tier projects?

We have a tiering checklist to make project tiering as easy as possible, but broadly speaking:

Tier 1 projects are large in scope, size, resource requirement and/or risk and are ambitiously strategic. Tier 1 projects require the greatest degree of resource and oversight.

Example project: Building a hospice in Liverpool.

Tier 2 projects are large and involve multiple teams. Tier 2 projects require organisational oversight and dedicated resource.

Example project: Rolling out the PLEO app or constructing the Liverpool Atrium.

Tier 3 projects are smaller/simpler in nature, but are often being done for the first time, before becoming BAU if repeated in the future. Tier 3 projects can usually be delivered departmentally but rely on input from other departments.

Example project: Upgrades to Select HR system.

BAU activity does not require the use of this project management approach (although the approach and project management tools may help to deliver day-to-day work).

Why do I need to complete project documentation?

Before a decision can be made about whether a project can go ahead, the appropriate decision makers need to have all key information about the project to consider. It's important that the documentation is detailed enough to help guide decision makers, but concise enough to avoid investing lots of time, effort and resource in case the idea is not approved. That is why we have split the Pre Project stage into two; a quick **Idea Outline** to understand if it's a 'Yes', 'No', 'Not now'. Then development of a more considered **Business Case** or **Light Business Case** to enable full approval.

For Tier 1 and Tier 2 projects, once the **Idea Outline** has been approved, a **Business Case** should be developed by the Project Manager. For Tier 3 projects, after the **Idea Outline** has been approved, a **Light Business Case** should be developed for departmental consideration at the approval stage.

> " It's really important that all documentation is provided so we can fairly assess all initiatives. We know this is new to Claire House, so please reach out to the Project Management Office for help and guidance completing any paperwork. "
>
> ## RHIAN BECKETT

STEP 2 – PROJECT APPROVAL

What happens during the Project Approval step?

Based on the information provided in the pre project stage, decision makers will now be able to decide whether to say 'Yes', 'No', 'Not yet' or 'Request more info'. The tiering level will also be verified at this stage. Decision makers at ELT level expect to meet quarterly (or if time critical, as soon as possible) to assess and approve new initiatives and will use a Prioritisation process to fairly assess and evaluate a project's priority in relation to what else is happening at Claire House. This is important so we remain ambitious and joined up whilst not overloading the organisation and trying to do everything.

There will be instances, especially for Tier 1 projects, where approval will need to be escalated to the Strategy and Projects Committee or Board of Trustees, in line with our agreed delegated authority limits.

Decisions at Tier 3 level can be made on an ad-hoc basis but should follow routine departmental processes. For example, be discussed at a regular departmental meeting like Clinical Leadership Team (CLT) or Fundraising Leadership Team (FRTL).

For projects that are approved, they will progress onto the Planning stage. For projects that are deemed to not yet be approved, or require more research, decision makers may request a **Project Initiation Document (PID)** to help aid their assessment. The Project Management Office and Project Champions are available to help guide and support you in this. Throughout the approval process, decisions will be made and shared in a timely, consistent and transparent way with the project originator.

> " Having good project management around the Christmas appeals helps to make the whole project run more efficiently and effectively. Because everyone knows what is happening and when, there is more time to think about each element of the campaign resulting in the project having an even bigger impact overall. "
>
> ## JESS ARNELL

THE PROJECT PROCESS:
STEP 3 – PROJECT PLANNING

What needs to happen during the Project Planning step?

Once the Business Case has been approved and the project is given the go ahead, the project planning stage commences. For Tier 1 and Tier 2 projects, a Project Manager will be assigned to the project and they will lead the development of a Project Initiation Document (PID) and start to develop the project plan. For Tier 3 projects, the project initiator will be supported to complete a Light Project Plan. It is during this stage that the roles, responsibilities and governance decisions will be identified and documented.

It is from this point in time that the Project Board (see glossary) take on all the decision-making responsibilities up to their agreed level of authority and the Project Manager ensures the project is delivered within the time, scope and budget that has been authorised.

Roles and responsibilities in a project

There are many essential roles that contribute to the smooth and effective running of a project. Establishing these roles and the responsibilities early in the project planning is essential to aid governance and help make projects successful. It also helps empower people to do their best work and avoid duplicating efforts. These roles and responsibilities should be captured in the PID or Light Project Plan and reviewed if and when necessary.

Project Roles:

The Project Management Office can help you consider key roles and responsibilities some descriptions and examples are outlined below.

Project Sponsor:

A senior individual who assumes overall accountability for the success of a project. The Project Sponsor oversees the project to ensure it delivers benefits. They help clear the way for the Project Manager to efficiently run the project, help to ensure the project fits with the organisation's vision, objectives and business plans, has the resources it needs including stakeholder buy-in, and helps to remove barriers and address risks to the project's success. This person might be a member of ELT for Tier 1 and 2 projects, and a member of the wider Leadership Group for Tier 3 projects.

Senior User:

This term is a Project Management best practice term. In practise, this is a senior person who has a direct interest in the project because they will 'use' the products the project creates. They will be enthusiastic about the work and the value it will bring. They will support the Project Manager early on in the project by setting quality expectations of how the project can be measured to be successful.

During the 64 Trust project, Lesley Fellows acted as the Senior User for the development of the music therapy and family consultation rooms, specifying how these rooms should feel for children, staff and families. She was also responsible for signing off the work once it was completed or raising any issues or snags that needed addressing.

Senior Supplier:

Another Project Management best practice term. The Senior Supplier provides services, goods or expertise to a project to help it achieve its expected benefits. They may be internal or external and will work with the Project Manager to deliver the work to the Senior User's specification.

Project Manager:

This person oversees the day-to-day running of a project, ensuring work is completed to the standard required. They motivate and support the team involved in the project, ensure appropriate people are engaged in a timely way, co-ordinate work done by different people and make sure the project is running on time and to budget. They have authority to make decisions to a certain, pre-agreed point, but don't usually have ultimate decision-making powers. The Project Manager is responsible for keeping a project on track, aligned to project scope, and within budget. They report to the Project Board and Project Sponsor at agreed intervals or when they need to escalate a decision.

Project Board:

A group responsible for supporting and oversight of the project, they provide guidance and direction as well as taking decisions that fall beyond the Project Manager's remit. They meet at agreed intervals throughout the duration of the project to ensure the project remains on track. The Project Board usually comprises the Project Sponsor, Senior User and Senior Supplier. Other project team members may be involved in meetings.

Project Support / Admin:

For large projects, admin or project support might be required. This person or people support the Project Manager to complete any documentation required, help facilitate meetings, coordinate project tasks and/or people to help keep the project on track. They report to the Project Manager.

Specialist:

For complex or technical projects, specialists or people with expertise might be relied upon to help manage expectations or provide guidance. They will report to either the Project Manager, Senior Supplier or Senior User if more appropriate.

Richard Lunt acted as the Senior Supplier during the 64 Trust project, taking the specification provided by Lesley and undertaking the work needed to supply the requirements. This involved working with estate teams, external contractors and having specialist working knowledge in order to manage User expectations.

THE PROJECT PROCESS: STEP 4 – PROJECT IMPLEMENTATION
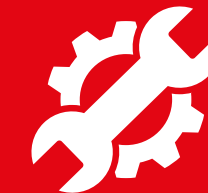
What needs to happen during the Project Implementation step?

Once planning has been completed, its time to start delivering the project. Within this stage Project Managers delivering Tier 1 and Tier 2 projects will maintain a **Project Plan**, using the helpful tools included to produce Gantt charts/timelines and track project risks, issues and changes (to name just a few). For Tier 3 projects, the **Light Project Plan** produced in the planning stage is maintained. The **Light Project Plan** includes some tools that are essential to be completed and some optional tools that you might like to test to see if you find them useful.

During implementation the project team meet on a regular basis, as work to complete the project is carried out. The Project Manager is responsible for ensuring the project remains on track and within the scope, time and cost that was agreed at the start. The Project Manager will also report back to the Project Sponsor and Project Board using a **Status Report**. If there are risks, issues or changes that need to be escalated, these will be shared with ELT for Tier 2 and 3 projects and shared with the Strategy and Projects Committee for Tier 1 projects.

❝ When working with a Commissioner or Trust, it's really important that we set targets, measure our success and do an evaluation to make sure lessons are learnt and learnings can be taken on to other projects. This helps us run the project we are working on well, and improve things for the future. ❞

ANDREW PICKERING, CARE

STEP 5 – PROJECT CLOSE

What needs to happen during the Project Close step?

Upon closure, all projects should complete a **Project Close Report**/**Light Project Close** report, to capture key lessons and learnings for the future. It will include a project evaluation and will assess whether the project achieved the benefits or outcomes it initially set out to accomplish, as per the original Business Case.

For Tier 1 and Tier 2 projects, the **PID** which was drawn up in the Planning stage of the project will describe the ways in which a project's benefits can be evaluated. For Tier 3 projects, the **Light Business Case** will also capture the expected outcomes.

It is important that throughout the Planning and Implementation steps, the benefits and project outcomes are agreed (and written down) so they can be tracked and monitored. This ensures the project doesn't drift and that everyone involved in the project has a clear understanding of what is to be achieved.

At the end of this stage, the **Project Close Report**/**Light Project Close** report should be shared and discussed with the Project Team and also with the Project Management Office, who will ensure lessons are captured centrally and used to improve future projects.

Here to Help

No one has to set out on the project management journey on their own. If you need any help or support, please contact Claire House's Project Management Office (projects@ clairehouse.org.uk) or seek out your departments Project Champion. There are also more tips and tools at the back of this handbook including appendices: Glossary of Project Management Terms (p21), Project Documentation Resources (p24), Case Studies (p28), and Claire House Project Management Champions (p29).

APPENDIX 1:

Glossary of Project Management Terms

Benefits

Benefits are the beneficial changes behind a project described at the start which need capturing and tracking. Sometimes unexpected benefits or disbenefits (negative consequences) may occur.

Benefits Management

The steps taken at the start and throughout the project to ensure that benefits are identified, planned, measured, tracked and achieved. This could be held in a Benefits Tracker.

Business Case

Captures the reason for why a project starts in the first place, highlighting the benefits it will bring once implemented. This should be regularly consulted and reviewed.

Deliverables

Are a set of products or outputs that are expected at the end of the project. Deliverables should be specified as early as possible and captured in the Project Initiation Document or plan. Deliverables need signing off by a named project resource before the project closes.

Governance

A framework of authority and accountability to provide control, direction, decision making and delivery.

Issue

An obstacle or problem that is actually occurring and needs to be addressed. If left untreated, a small issue could turn larger and jeopardise project delivery or project success.

Programme

Represents a collection of projects that aim to deliver or contribute to a set of objectives under the same strategic branch.

Project

Projects invoke a change, deliver something new and have defined start and end dates. They can vary in size and complexity from small day to day improvements to large transformational change which may comprise a number of projects to make up a 'Programme'.

All projects aim to deliver against a brief and have assigned roles, responsibilities, governance and budget.

Project Board

A group responsible for supporting and overseeing the project, they provide guidance and direction as well as taking decisions that fall beyond the Project Manager's remit. They meet at agreed intervals throughout the duration of the project to ensure the project remains on track. The Project Board usually comprises the Project Sponsor, Senior User and Senior Supplier. Other project team members may be involved in meetings.

Project Champion

A group of 'champions' who are interested in project management and who will become the go-to people in their teams, offering colleagues advice on how to plan a project and how to get it signed off.

Project Manager

This person oversees the day-to-day running of a project, ensuring work is completed to the standard required. They motivate and support the team involved in the project, ensure appropriate people are engaged in a timely way, co-ordinate work done by different people and make sure the project is running on time and to budget. They have authority to make decisions to a certain, pre-agreed point, but don't usually have ultimate decision-making powers. The Project Manager is responsible for keeping a project on track, aligned to project scope, and within budget. They report to the Project Board and Project Sponsor at agreed intervals or when they need to escalate a decision.

Project Management Office (PMO)

A team of people who have an overview of what projects are planned and underway and provide support and expertise for projects and the people planning and making change. They are not responsible for deciding whether projects start or stop. At Claire House, the Project Management Office function is performed by what was formerly known as the Projects Team.

Project Sponsor

A senior individual who assumes overall accountability for the success of a project. The Project Sponsor oversees the project to ensure it delivers benefits. They help clear the way for the Project Manager to efficiently run the project, help to ensure the project fits with the organisation's vision, objectives and business plans, has the resources it needs

including stakeholder buy-in, and helps to remove barriers and address risks to the project's success. This person might be a member of ELT for Tier 1 and 2 projects, and a member of the wider Leadership Group for Tier 3 projects.

Risk

A risk is an uncertain event or condition that if it were to occur, could impact the project. Risks should be tracked and managed appropriately, which might include implementing mitigation measures.

Scope

Project scope is the "what" is being delivered, involving the tasks and activities of the project as well as it's deliverables. Having this written down is important so tasks remain relevant and "in-scope" of the project.

Scope Creep

This is a way of describing when a project drifts, usually when tasks or deliverables aren't agreed or written down, so goal posts start to shift.

Senior Supplier

This term is a Project Management best practice term. The Senior Supplier provides services, goods or expertise to a project to help it achieve its expected benefits. They may be internal or external and will work with the Project Manager to deliver the work to the Senior User's specification.

Senior User

Another Project Management best practice term. In practise, this is a senior person who has a direct interest in the project because they will 'use' the products the project creates. They will be enthusiastic about the work and the value it will bring. They will support the Project Manager early on in the project by setting quality expectations of how the project can be measured to be successful.

Stakeholder

People who are impacted by a project and need to be involved or consulted with. A stakeholder mapping tool such as a RACI chart (who needs to be Responsible, Accountable, Consulted or Involved) which might help you plan and manage your stakeholders

Strategy and Projects Committee

A group of representatives from across the organisation, including a Trustee Board Member, who have oversight of strategic direction and projects that are high profile, complex or risky. This group forms part of Claire House's overall governance structure.

APPENDIX 2:

Project Documentation Resources

Below lists and links the documentation resources that are required to be populated throughout the project lifecycle.

Pre Project Documentation

Idea Outline (All)

A brief outline of the idea or problem that you want to solve. This document includes a simple tiering checklist to help understand which tier the project should be. The aim of this document is to capture some initial thoughts, without investing too much time before resource investment in developing a Business Case is agreed.

Business Case (Tier 1 &2)

A document which summarises key points about the proposed project in enough detail to enable ELT to make a decision on whether this project should be approved and when it should be scheduled.

Light Business Case (Tier 3)

A shorter version of the full business case document which summarises key points about the proposed project in enough detail to enable departmental leadership to make a decision on whether this project should be approved.

Project Planning Documentation

Project Initiation Document PID (Tier 1&2)

Drawn up at the planning stage of a project to provide a baseline to assess progress against, as well as providing a plan of approach which details scope, objectives, roles and responsibilities, high-level financial case for investment, stakeholders, risks, project controls, reporting frameworks and PID sign off. This helps clearly identify and distinguish what is within the project's remit and what sits outside the scope of the work.

Light Project Plan (Tier 3)

Developed at the planning stage, this spreadsheet provides a brief outline of the plan and the roles and responsibilities within the project. This document also includes additional tabs that can be used to help monitor the project in the implementation stage (described on the next page).

Project Implementation Documentation

Project Plan (Tier 1&2)

Key for keeping the project on track, this document includes lots of tools to ensure project success. It includes;

- **A Gantt Chart:** a visual timeline with key tasks/actions and milestones.
- **An Action Log:** a project wide to-do list, for discrete, individual actions that are agreed at meetings or elsewhere.
- **A Risk Log:** to help keep track of risks and capture mitigating actions. Risk = something that MAY occur which could hinder the project.
- **An Issue Log:** to help keep track of issues and capture decisions to resolve them. Issue = something that HAS occurred which may hinder the project.
- **A Change Log:** to help keep track of any change requests that may need to be discussed and approved throughout the project.
- **A Stakeholder Map:** to capture the stakeholders involved internally and externally, incorporating RACI and comms preferences.
- **Benefits Tracker:** to identify and record the anticipated benefits, identify and consult with the stakeholders that will be affected by the benefits and produce a baseline against which the realisation of benefits can be measured.
- **A budget:** to track the expected and actual costs involved in the project.

Light Project Plan (Tier 3)

Key for keeping the project on track, this document includes lots of tools to ensure project success.

It includes the following mandatory planning tools:

- **An Action Log:** a project wide to-do list, for discrete, individual actions that are agreed at meetings or elsewhere.
- **A Risk Log:** to help keep track of risks and capture mitigating actions. Risk = something that MAY occur which could hinder the project.

- **A Stakeholder Map:** to capture the stakeholders involved internally and externally, incorporating RACI and comms preferences.
- **A budget:** to track the expected and actual costs involved in the project.

And the following optional tools:

- **A Gantt Chart:** a visual timeline with key tasks/actions and milestones.
- **An Issue Log:** to help keep track of issues and capture decisions to resolve them. Issue = something that HAS occurred which may hinder the project.
- **A Change Log:** to help keep track of any change requests that may need to be discussed and approved throughout the project.
- **Benefits Tracker:** to identify and record the anticipated benefits, identify and consult with the stakeholders that will be affected by the benefits and produce a baseline against which the realisation of benefits can be measured.

Status Report (All)

Status reports are a useful tool to communicate progress and key upcoming tasks, at a frequency agreed by the Project Manager and any reporting lines that they follow. They usually take the format of:

- Recent achievements
- Key upcoming tasks
- Risks/issues and mitigation

Project Close Documentation

Project Close Report/Light Project Close Report

Post project evaluation should be completed within a reasonable timeframe after the closure of a project. The area of focus with a post project evaluation, is considering whether objectives were met, and if the project presented value for money when considering the benefits achieved (not necessarily a return on investment). Lessons learned will also be captured within this and are valuable for both individual employee development, as well as organisational development.

APPENDIX 3:

Case Studies

Tier 1 example

The 2023 Reward & Recognition project reviewed salaries across Claire House to make us competitive with the market, delivering on the organisational commitment to be the best employer and ensure we attract and retain staff.

Impacting on every member of staff, with a high level of complexity, it carried both financial risk (high ongoing costs) and was strategically important (if we cannot recruit and retain staff we cannot run the organisation). It required Trustee and ELT sign off. As it was essential that the process was seen as transparent, simple and consistent, a cross organisational group was set up to deliver to tight deadlines using project management processes.

Tier 2 example

The Politics group brought together representatives from across the organisation to coordinate Claire House's campaign to retain the Children's Hospice Grant, that was not guaranteed beyond 2023–24.

As the Grant covers a fifth of Claire House's care costs and is worth almost a million pounds a year, the possibility of losing it carries considerable financial risk. Having not campaigned on this issue for a number of years, it was seen as a 'new' area of work, that required the knowledge and skills of staff across the organisation. Working as part of a wider national campaign with Together for Short Lives and hospices around the UK, the group required project management support to ensure clear deadlines were set, and responsibilities were clear. It reported to ELT, and after positive funding news from Government, the campaign has been put on hold.

Tier 3 example

To improve user experience and the risk of network issues, we upgraded Select HR. The new system provided an updated user view but with the same functions and workflows in place. The priority was to improve user access to the system at all levels.

As we were upgrading the system, rather than replacing it, the project did not require a complex plan. However, as it was urgent, all staff needed to log in to the new system and there was some downtime when neither version of Select HR would be available, the project needed some coordination. The upgrade was project managed and delivered by the Business Analyst in partnership with ICT and with support from Communications.

APPENDIX 4:

Claire House Project Management Champions

Champions are the go to people across the organisation who can offer advice on how to plan a project and how to get it signed off.

WHO ARE THEY:

Care:
Lawren Harris
Beth Ward
Andy Curtis
Claire Jones
Jo Hill

Fundraising:
Rachel Handley
Debby Lofthouse
Laura Fallon
Loren Stubbs

Comms:
Jess Arnell
Laura Kelly

Support services:
Tamsin Harrison
Becky Neish
Gemma Edwards
Beth Schofield

Retail:
Sara Forfar
Sally Eagles
Jane Daud

Volunteering:
Lucy Reynolds

Please note, all members of the Leadership Group have also received project management training and are happy to help with queries.