

CHARTERED MANAGEMENT INSTITUTION  
DIPLOMA IN MANAGEMENT

UNIT 5009  
PROJECT DEVELOPMENT AND CONTROL



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## **History of the Defence Academy**

The Defence Academy is the UK Defence's Higher Educational Institution - and a key component of operational capability. The Academy is comprised of the Royal College of Defence Studies, the Joint Services Command and Staff College, the Defence College of Management and Technology, the Advanced Research and Assessment Group, and the Armed Forces Chaplaincy Centre. The Academy has three strategic partners – King's College London, Serco Defence and Aerospace, and Cranfield University – who provide our academic and facilities support. The Joint Services Command and Staff College (JSCSC) trains the future commanders and staff officers of all three UK Armed Services and those from many countries around the world.

Serco are a facilities management company contracted by the MOD to run various aspects of the JSCSC. They provide support through training services, logistics, estates, finance, travel and Sports and fitness.

I am employed by Serco to run the JSCSC fitness suite and sports fields. My role at the college is Head of Sports and Fitness. I am a lone worker, I have no staff and report to my line manager only.

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## Part A – The Nature of Projects

### Introduction

According to Gray in my self study guide, a project is a unique, finite undertaking with clearly defined objectives involving many interrelated tasks or activities and the contribution of a number of working co-operatively under centralised control to produce a specified outcome or product within clearly defined parameters of time, cost and quality.

A project is something that is different from the day in day out routine of normal working functions. It's an additional piece of work that is unique that must be completed.

### Why projects fail

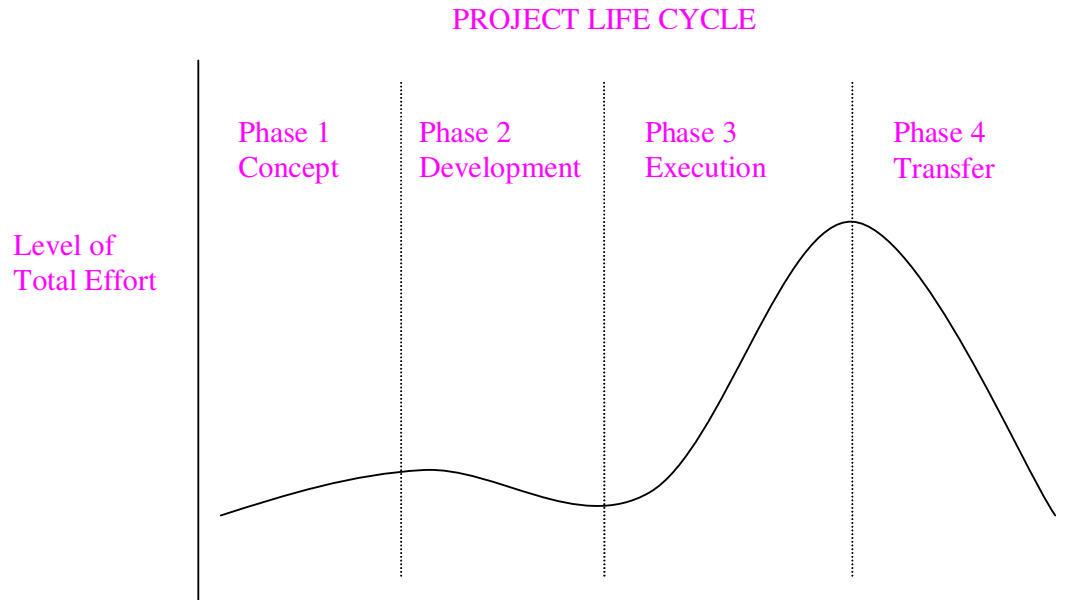
My self study guide suggests a number of common reasons why projects can fail. I have related these to a project I was involved in last year which was the refurbishment of fitness equipment in the gymnasium.

<b>Risk Factors</b>	<b>Refurbishment project</b>
Project goal is not SMART	The project goal was SMART as it had to be done and done so in a certain period.
Goals are SMART but things changed	The goals were smart but as with many projects, things changed. The main project goal always remained the same but some things had to change.
Good planning but poor resources	The resources used specifically for the equipment were excellent.
Bad planning	Initial planning was weak to start off with but then with some work the plan became stronger and made the project a lot easier.
No contingency planning	There wasn't really a contingency plan. This was something that had to happen no matter what
Poor project managing	There wasn't too much formality with the project management and a lot of times, work was sat with him which ultimately slowed the process down.
Roles and responsibilities	Everyone involved was clear about their own individual roles and responsibilities. Everyone was happy to get on with their tasks.
Limited support from senior management	There was a lack of support from senior management. Sometimes you could be waiting for assistance for a long time.

From this comparison it can be seen that the project was fairly straight forward. The main areas the project fell down on was the help and guidance from the Project Manager and Senior Management Team. There was also no contingency plan for when things did go wrong. The end result was still the same in spite of these issues but the project could have run smoother.

## The project life cycle

My self study guide gives four main phases that larger projects tend to have. These phases can be seen in a project life cycle chart below:



**Phase 1 – concept** – this involves identifying a need, opportunity or problem and then looking at the possible benefits of taking the project on. From breakdown statistics and usage statistics of equipment in the fitness suite there was a need to refurbish the equipment as it was becoming unserviceable and people seemed to not use what was already there. The Project manager decided it was time for a refresh. At this point, quotes were also gathered from various equipment companies to see if costs would work.

• Purpose	Yes – improve service provided by providing relevant training equipment
• Strategic fit	Yes – less breaking down of equipments, all under warranty, greater use by students
• Objectives	Yes – provide newer, advanced equipment
• Scope	Yes – the
• Terms of reference	Yes – from the contract of providing equipment and the asset renewal programme
• Draft schedule	Yes – work had to be complete by September 2007
• Budget Estimate	Yes – budget was set by the asset renewal allocation

**Phase 2 Development and Planning** – this phase is about developing a solution to the stated problem and any outside contractors will be requested to submit their final proposal. Contracts are signed and exchanged.

Team members	This is a small project and there are only a few people working on it
Objectives and plan deliverables	These details were agreed
Budget schedule and baseline budget	The money was available and going over budget was non negotiable
Risk issues alternatives	There were no risk issues discussed
Sketches and drawings	Drawings of the fitness suite were made up with to scale equipment size to make sure everything new would fit in.
Approval	This was approved by Defence Management and the Serco Director
Communication plan	There was no communication plan other than to make sure everyone was kept in the loop.

This development plan was fairly time consuming but it was important to get all the details right. The hardest part was sorting out the drawing of the fitness suite to scale.

**Phase 3 execution** – this phase is where the detailed planning of the project and the overall objectives of time cost and quality identified. This is where delivery and installation of equipment occurs. This is a very busy period while trying to keep the gym running and also trying to make sure everything runs smoothly.

Mobilize team and execute work	This was fine as all parties involved and needed turned up
Monitor and control testing	There was not set checklist other than to ensure all items were there
Procurement Forecasting Technical issues	Moving of the new equipment into the fitness suite, removing the old equipment and installing the machines and ensuring they run. This all went according to plan
Resolve issues Risk assessment	The risk assessments where already prepared in advance and were updated on completion
Time management	All finished on time
Communication	Keeping the estates team, supplies and Defence Management in the loop about everything

This stage went better than expected. Although the delivery date changed a few times; when everything came together, it all worked.

**Phase 4 transfer close out** – The final phase involves the confirmation that the overall objectives against the business case have been achieved and any payments made. It is also important to evaluate the project and learn for the future and deliver the final project to the intended customer

Project closure	Report to the Defence Management manager and the Serco director
Lessons learned	Share learning and recommendations to the future
Team feedback	Make sure everyone had a chance to give feedback
Acknowledge good results	Thank everyone involved and ensure that line managers are aware of the good work

This project was relatively small but needed a lot of work before it could go ahead. The finance and budget were not a problem. Contract variations needed to be signed off which is a lengthy process. The asset renewed programme had to be updated and checked. Phase 2 the planning and development was the hardest part of the project and identified the need to allocate more time per project.

## **Part B – Making my case**

### **Introduction**

Every company is faced with many projects and quite often decisions are made as to which project takes priority over others. To prioritise projects, some criteria need to be looked at:

- What are the costs of each project?
- Is it affordable
- Is there enough time
- How urgent is the project
- What quality issues surround the project.

Once the criteria has been developed, each project can be graded against it and the result would be a list of projects in some kind of priority order.

### **Serco**

At Serco, projects are prioritised on a necessity value. Each case is presented to the MOD authorities for their thoughts also so we are all on the same page working together to provide a better service. The projects are prioritised on urgency more than anything. We are lucky at the Defence Academy as there are good budgets in place so money isn't really a problem if the project is agreed upon. Finance isn't the biggest criteria but urgency and benefits. Within the Defence Academy we try to run projects that de-conflict with busy periods. The Chief of Staff (COS), DM and Serco will together come up with a date that the works should start. If there is disruption to usual service, a disruptive works notification is to be sent out to all users so everyone is aware.

### **Mission statement and strategic objectives**

Most organisations have a mission statement which represents its purpose for existence. As Serco is a facilities management company, its mission statement is 'Bringing Service to Life'. The mission statement is the first consideration for any employee who is evaluating a strategic decision and to enable the organisation to achieve its mission it will have a set of strategic objectives and all projects are aligned with these.

## Presenting my case

A rationale for the project	This shows understanding and why the project is feasible. Why it is beneficial to all needs to be identifiable.
The projects objectives	So people are clear on what is to be achieved
A list of constraints and success criteria	Including the proposed schedule and budget and what quality issues exist. The success criteria is normally linked to what the customer wants
The scope of the project	Indicating who will be involved, what processes will be involved and how the project will affect existing working practices
Relevant options	Showing how they address both the constraints and success criteria
An investigation of all relevant costs	This accounts for getting all the quotes from various suppliers and the cost of works needed to support the machines
Realistic return projections	This isn't financial on this project as there is no financial gain. Increased usage and maximising the facility is the gain.
Possible risks and contingencies	The possible issues with the new equipment – is there warranty etc
Communication proposals	Poor communication means projects fail. Communication is paramount.
Monitoring, control and evaluation methods	It is important that the service users and the MOD authorities are kept informed. Seeking feedback at every opportunity.
Final recommendations	A summary including costs and benefits once again.

This exercise has shown that a good case was presented but lacking in detail for estates work and communication. The decision was made to go ahead with this project as too many machines were breaking down thus not fulfilling a good service. Identifying the benefits was key.

## Part C – Project managers, project teams and project resources

### Introduction

The effectiveness of a project is down to those working within it and that includes the project manager, the project team and other stakeholders.

### The project manager

A project manager is a facilitator and does whatever they can to ensure the project team work and that the project stays on the right line. According to the business dictionary online, a project manager is an employee who plans and organizes the resources necessary to complete a project. The key role is to ensure the success of the project objectives through co-ordinating, controlling and communicating.

### Roles and responsibilities

**Organising** – internal and external resources and assigning particular tasks ensuring responsibility and accountability. For my project, I passed some responsibility on to the Estates Department so get the electrics ready.

**Planning** – project objectives must be SMART. I know this project was SMART as this was part of the bid.

**Controlling** – the original plan should be reviewed at each crucial stage. Corrective action should be taken as needed. I didn't check things were ok at each crucial stage so I could have improved on this.

**Communicating** – the project manager must be good at this. I think I am very good at communicating I could have communicated more frequently though.

### **The project team**

The self study guide suggests that Meridith Belbins study on team roles indicates that a team needs to have a mixture of types of roles in order to work well and succeed.

No such formal consideration was taken in selecting this project team. As most parties work individually it wasn't so much about creating a perfect team but getting the job done. Belbin suggests a multitude of role types. I was aware that people play different roles in teams but based on skills and hierarchy rather than the roles Belbin suggests. I haven't been involved in too many big projects to identify these but it is something I can look at on my next project. I understand that it is important that people know their team role.

### **Team stages**

It is important to stand back from a team and form an understanding of what stage they are at in their development. My self study guide uses Tuckman 1965 as a clear example of the stages. The stages are:

Stage 1	Forming	This is fine but not too productive
Stage 2	Storming	Real people issues start to surface. Cultural differences develop
Stage 3	Norming	everything working and everyone working hard towards a common goal
Stage 4	Performing	All fixed on the task
Stage 5	Adjourning	Completion of task

The project was only short with very few people involved so not all the stages were reached.

### **Project Resources**

Every project is unique. I know quantities specifically for what I want. Other resources will be a bit of hard guess work. My self study guide suggests typical resources to consider:

**People** – Belbins team roles is a good way of working out peoples strength and makes the team whole. As mentioned earlier this is not something I used. Some people in the team work on their own so it would be impossible to select anyone else.

**Finance** – needs to be clear for who is paying what and when. My project was easy financially as there was enough money to refurbish the fitness suite equipment as it is allocated annually. The payment system within Serco is also easy and quick.

**Time** – initially it seemed there was plenty of time to carry out the project. That however changed when the change variations took a long time to be agreed and signed off. paper trails can be slow. Having said that the project was complete on time.

**Information** – the information was shared with the entire team as regularly as needed.

**Equipment and materials** – the equipment was the pieces getting removed and the delivery and installation of the new kit. The electrical kit were also materials.

**Services** – we are now providing a more up to date service catering better to the needs of the customer.

## **Part D - Planning Projects**

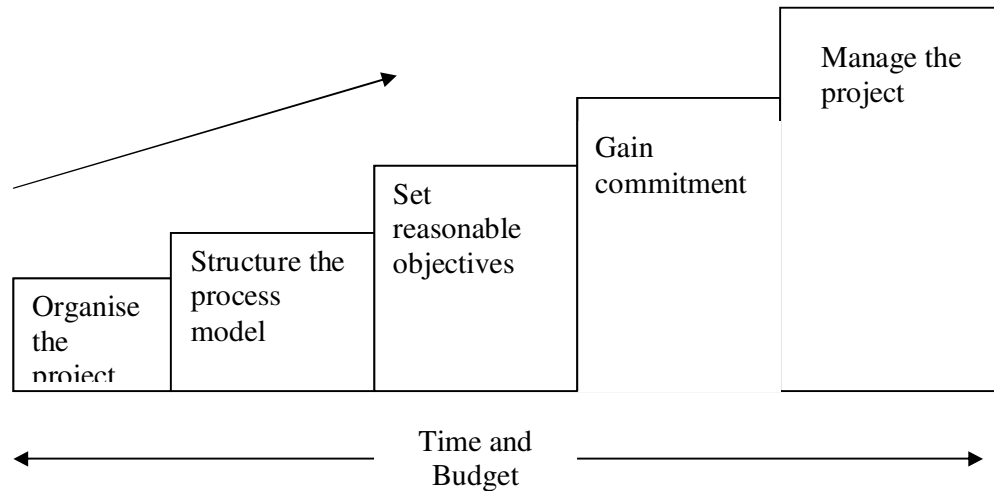
### **Introduction**

The approach used to run projects can be referred to as a methodology. A methodology according to my self study guide may be defined as ‘the study or theoretical analysis of such working methods. According to the business dictionary, methodology can be defined as, ‘System of broad principles or rules from which specific methods or procedures may be derived to understand different situations (or solve different problems) within the scope of a particular discipline. Unlike an algorithm, a methodology is not a formula but a set of practices.’

### **Project methodologies**

Project methodology defied by nao.org is a methodology that represents a package of practical ideas and proven practices for a given activity such as the planning and development of IT based systems.

My self study guide suggests Prince and Princes2 as examples of tried and tested project methodologies. The guide suggests 5 steps to a successful project.



For this project I chose to use a simple methodology. This was because it is easy for everyone at every level to understand and it used simple common language which is important when working with a variety of people. Prince 2 suggests a more complex methodology which allows the project to be broken down into stages allowing for easier planning of resource need but this was needed for such a small scale project.

### Planning tools

There are many simple planning tools that can be used in project management. It is good to be familiar with the tools. My self study guide suggests some of these tools that can be used.

**Work breakdown structure (WBS)** – this method breaks a project down into 5 sections. Applying this tool to my project would go as follows:

Level 1	Decide what is needed for the replacement of the equipment
Level 2	Put together a list of items
Level 3	Purchase the items
Level 4	Install the equipment
Level 5	Invite stakeholders to use the equipment

By breaking down the project into small sections allows the project to be more easily manageable.

Gantt charts – these were invented by Henry Laurence Gantt. He developed these charts as a visual tool to show scheduled and actual working progress of projects. These are now accepted in commonplace management but are generally used on larger projects. The Gantt chart below is one I have made for my project.

	June				July				August			
	4	11	18	25	2	9	16	23	30	6	13	
Research	■	■										
Proposal		■	■									
Authorisation				■	■	■	■					
Orders					■	■	■					
Preparation						■	■	■				
Delivery								■	■			
Usage									■	■	■	
Feedback											■	

**Critical path analysis (CPA)** - is a good scheduling tool. The idea is that you list all the parts of the project and show the earliest start date and the time it will take to complete. You also indicate if a task can be completed at the same time as other tasks.

**Flow charts** – these are another way of showing activities that need to be completed. They are very similar to a CPA but do not include times scales.

**Part E – Monitoring, Controlling and Evaluation**

**Introduction**

The role of a project manager in monitoring and controlling a project is simply to measure the progress and assess if it differs from what was planned in the first place. If there is a difference, then the corrective action needs to be taken to bring the project back on line. There are a few control issues that I must keep in mind, these are:

**Time** – are we working to the schedule that is planned (Gantt chart)  
 What are the points and risks

**Cost** – have we purchased the equipment at the best price  
 How are we paying for the equipment  
 Must be paid in 28 days of delivery

**Quality** – Is the equipment of the highest standard  
 Is the customer going to be happy  
 Have we made improvements

**Why Monitor?**

Monitoring is part of the control process of any project. Monitoring and evaluation processes should be highlighted in the strategy. On this project this was not done. As manager of this project I need to be aware and kept aware of progress. It is important to make sure that you don't over control when you are monitoring and it can send out the message of mistrust.

After the project has been complete it is normal to produce a report on the project appraisal. This should be done by an independent party but it will show if the project specifications have been met. Again, this is something that was not carried out after the project ended. These are areas for improvement for the next project.

## **Stakeholders**

The success of this project really is determined by increased usage figures rather than written reports. The project was only brief and the success comes with the durability of the machines and general feedback from the service users. All stakeholders as a majority benefited from the turnover of equipment. Feedback from the stakeholders helps ensure we have achieved the criteria we set out at the beginning. During this project I didn't come across stakeholders that did damage to the project other than the timely return of some documents by one or two people.

## Conclusion

- The project outlines were set by Defence Management and the MOD authorities following the continual break down of equipment in the fitness suite. Money was allocated from the asset renewal program which stipulates a life expectancy and turn over of equipment. The idea was to improve the quality of equipment in the fitness suite whilst changing some of the pieces to be fit for need. There was no room for going over the budget but the budget was more than big enough to carry out the project.
- The project plan was thorough and was actually quite time consuming as the scales of the fitness suite and equipment needed to be exact to ensure that everything would fit in. The plan was written up onto a SMART template. Little detail other than the drawing were required.
- The project did work to plan although there were a few hold ups. The signing off on the project and authorisation for the electrical works to be carried out took a lot of time. The project fell off planed time at this stage but there was no foreseeing these delays.
- Everyone in the team did their parts well other than signing things off slowly. The support from other team members was strong throughout the project as everyone wanted it to be successful.
- There was a delay with the treadmill delivery and I had to make a choice whether or not to delay everything else or take what I could one day and the treadmills another. I chose to take everything together as it would cause the least disruption to the service users.
- The delivery of equipment, installation and removal of old kit went very well. All this happened within a single day. The Estates team had already prepared the new electrical requirements needed for this kit so these were hard wired on in delivery. All the kit came and worked right away.
- The project was completed on time. Although there were one or two minor hold ups the project ran relatively smoothly. The stakeholders are happy and the kit is being used more now than before so the project was worthwhile.

## **Recommendations**

- More time for planning will be allocated on the next project to ensure that nothing needs to be rushed. The drawings took a long time and this was not expected initially.
- Consulting the service users prior to a plan like this next time would be a good idea. Although the choice of equipment was made from usage statistics on signing in, talking to the service users and perhaps asking them to fill out a quick survey on what they would like might work better next time.
- Allocate more time for contract variations to be signed off and passed through the channels.
- Talk more closely with other team members for regular updates so that I am in the loop about when work is complete
- Use checklists to help ensure everyone knows what sections have been done and when.
- Review the project on completion as this is something that wasn't done this time.

## **Bibliography**

Candidate self study guide – project development and control

Business dictionary online

Dictionary online