

Project MANAGEMENT and **BUDGETING**

**WE
DON'T
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Consultation Insights and Learnings

During the design phase of creating this guide, a virtual consultation with young people associated with We Don't Settle was held to capture their expectations of what they'd like the guide to include. During the session, they shared their understanding and experiences with project management, highlighting anticipated barriers and challenges, and the types of projects they would apply the guide to, providing valuable feedback on how to tailor the resource to better support their needs and aspirations. Key themes within the discussion emerged.

Experiences of project management:

The consultation highlighted the varied previous experiences with project management among the participants, ranging from active stakeholders in We Don't Settle projects to lower-level project support roles. Despite these differences, there were high aspirations to manage projects across various sectors, including activism, the arts, and community outreach. The group expressed uncertainty about where to begin learning project management, noting that it is not typically something people actively seek out but rather something they often fall into.

Anticipated challenges:

The participants shared observations of project management challenges, such as things not going to plan and staff turnover, which have made them anxious about taking on more senior roles. These experiences have led to a lack of confidence, as they feel they do not yet possess the skills to navigate such unpredictable situations effectively. This anxiety highlights the need for targeted support and training to build their project management capabilities.

Support and mentoring:

They expressed that they would greatly benefit from the opportunity to shadow a seasoned project manager in their sector of interest, providing them with a clear example of effective project management and the chance to ask questions. Once they feel confident enough to deliver a project on their own, having a mentor available for support would be highly valuable. This approach would help build their skills and confidence in handling the complexities of project management.

Accessibility and Usability:

They expressed that the guide would be a great resource for young people to explore project management at their own pace, offering a reference they can return to as needed, rather than relying solely on course retention or personal notes. They highlighted the importance of making the resource accessible in language, with visual examples and templates where appropriate, to enhance understanding and practical application.

This consultation informed the structure of this guide, ensuring it was user-friendly and tailored to meet the practical needs and learning styles of young people, providing clear, accessible language, visual examples, and useful templates.

Introduction

This guide is designed specifically for young people to help you navigate the exciting world of project management, whether you're organising an art exhibition, a community project, or an event, this guide provides you with the tools and knowledge to plan, execute, and successfully complete your project. By following the steps and using the resources provided, you'll be able to manage your project more effectively, stay organised, and achieve your goals.

Learning project management skills is invaluable, even for small-scale projects. Here's why these skills are essential.

Organisation

Project management helps you stay organised, ensuring that every aspect of your project is planned and accounted for. This reduces stress and makes it easier to manage multiple tasks happening at the same time.

Efficiency

By following a structured approach, you can use your time and resources more efficiently, avoiding unnecessary delays and overspending.

Goal Achievement - Clear objectives and well-defined plans increase your chances of successfully achieving your project's goals.

Problem-Solving

Project management equips you with the tools to anticipate potential problems and develop solutions, helping you handle challenges effectively.

Team Collaboration - Whether you're working with peers or managing a team, project management fosters better communication and collaboration, ensuring everyone is on the same page.

Professional Growth

These skills are not only useful for your current projects but also enhance your resume and career prospects, making you more attractive to future employers or collaborators.

Project Management Basics

In this section, you will learn about the fundamentals of project management, including its definition, key players, and essential terms and concepts that are crucial for understanding and executing successful projects.

Learning project management skills is invaluable, even for small-scale projects. Here's why these skills are essential.

What is Project Management?

Project management is the process of planning, organising, and overseeing a project to achieve specific goals. Think of it as a way to make sure you get things done efficiently and effectively. Whether you're planning an art exhibit, a community event, or a heritage project, project management helps you keep track of all the moving parts and ensures everything runs smoothly.

Key Terms and Concepts

Here are some important terms and concepts you need to know:

Project

A project is a temporary effort to create a unique product, service, or result. For example, organising a local art festival is a project.

Objectives and Goals

These are the specific results you want to achieve with your project. Objectives are more detailed and specific, while goals are broader. For example, a goal might be to promote local artists, and an objective could be to have 20 artists participate in your festival.

Mission

The project mission defines the overarching purpose and direction of your project. It articulates what you aim to achieve and why the project exists. This mission provides a clear focus, guiding decision-making and aligning the team's efforts toward a common goal.

Stakeholders

These are the people or groups who have an interest in your project. They could be team members, sponsors, community members, or anyone affected by the project.

Deliverables

These are the tangible or intangible outputs of your project. For example, a deliverable could be the art festival itself, the promotional materials, or the final report of the event.

Key Performance Indicators (KPIs)

KPIs are measurable values that help track the progress and success of your project. They provide a clear way to assess whether you're meeting your objectives and staying on track. Common KPIs in project management include timelines, budget adherence, and stakeholder satisfaction.

Milestones

These are significant points or events in your project timeline that mark the completion of a major phase of the project. For example, securing a venue or launching the event website could be milestones. Milestones are often a key marker in monitoring progress of your project for funders and other stakeholders.

Tasks

These are the specific actions that need to be completed to achieve your project's goals. Tasks should be manageable and clearly defined. For example, designing posters, contacting artists, and setting up the venue are all tasks.

Critical Path

The critical path is the sequence of tasks that determines the minimum time required to complete a project. It includes all essential tasks that directly impact the project's finish date. If any task on the critical path is delayed, the entire project will be delayed.

Dependencies

Dependencies are tasks or activities that rely on the completion of other tasks before they can begin. Identifying dependencies is crucial for effective project planning and scheduling. Understanding dependencies helps in sequencing tasks correctly, ensuring a logical flow of work, and avoiding delays.

Timeline

This is a schedule that outlines when tasks and milestones need to be completed. A timeline helps you stay on track and ensures that you meet your deadlines.

Budget

This is the amount of money you have to spend on your project. Managing your budget involves planning how much each part of your project will cost and keeping track of expenses to avoid overspending.

Scope

This refers to the boundaries of your project – what is included and what is not. Clearly defining the scope helps prevent the project from becoming too big or unmanageable.

Risk Management

The critical path is the sequence of tasks that determines the minimum time required to complete a project. It includes all essential tasks that directly impact the project's finish date. If any task on the critical path is delayed, the entire project will be delayed.

Team Management

This is about organising and leading the people who are working on your project. Good team management ensures everyone knows what they need to do and works well together.

Monitoring

This involves regularly checking on tasks, milestones, and timelines to ensure the project stays on track. This can include regular meetings, status reports, and using tools like Gantt charts to visualise progress

Evaluation

After your project is complete, evaluation helps you understand what went well and what could be improved. This can involve gathering feedback from stakeholders and reflecting on your own experiences.

Setting Objectives and Goals - How to Define Clear, Achievable Goals

Setting clear and achievable goals is the first step in planning a successful project. Goals give your project direction and help you measure your success. Start with the “*Big Picture*” and think about what you ultimately want to achieve. Ask yourself, “*When the project is finished, how will I know it’s been successful. What would it have achieved?*”

Make Your Goals SMART

Specific - Clearly define what you want to accomplish. Instead of saying, "I want to promote local artists," say, "I want to organise an art exhibition featuring 20 local artists."

Measurable - Make sure you can track your progress. For example, "I want 200 people to attend the exhibition."

Achievable - Set realistic goals considering your resources and constraints. If you have limited time and budget, aim for a smaller, manageable event.

Relevant - Ensure your goals align with your overall mission or purpose. If your mission is to support local artists, your goal should reflect that.

Time-bound - Set a deadline for your goals. For example, "I want to hold the exhibition by September 30th."

Break Down Your Goals into Objectives: Objectives are specific steps that help you achieve your goals.

For instance, if your goal is to organise an exhibition:

Objective 1:

Secure a venue by August 1st.

Objective 2:

Confirm participation of 20 artists by August 15th.

Objective 3:

Promote the event through social media and local newspapers by September 1st.

Defining Key Performance Indicators (KPIs)

To effectively measure your progress, it's important to define Key Performance Indicators (KPIs) at the outset. KPIs provide a baseline and allow you to track changes throughout the project. They help you assess whether you are meeting your objectives and goals. For example:

Venue Secured

Number of venues contacted and confirmation date.

Attendees

Number of attendees confirmed by the deadline.

Promotion Success

Engagement metrics from social media.

Baseline and Change Measurement

At the start of your project, establish a baseline for each KPI. For example, if you're tracking social media engagement, note the current number of followers and engagement rate. At the end of the project, measure the change to evaluate your success.

Embrace Learning

It's also valuable to recognize that not all efforts will yield expected results. Learning from what didn't work is crucial for improvement. Analyse unsuccessful strategies and adapt them for future projects, ensuring continuous growth and development.

Identifying Stakeholders: Understanding Who Is Involved and Affected by the Project

Stakeholders are individuals or groups who have an interest in the outcome of your project. Identifying them early on helps ensure you consider their needs and keep them informed. Be mindful, stakeholders can be both for or against your project or what it represents, this is something to keep in mind particularly with projects with extensive community involvement. Being aware of the diverse perspectives related to your project focus will give you the advantage of preparing for any potential challenges.

Make a List of Potential Stakeholders

Internal Stakeholders

These are people directly involved in your project, such as team members, volunteers, and organisers.

External Stakeholders

These include people who are affected by or have an interest in your project but are not directly involved. Examples are sponsors, local community members, participating artists, and local government officials.

Analyse Their Interests and Influence

Interest

How much does the stakeholder care about your project? Are they highly invested, or are they only mildly interested?

Influence

How much power do they have to affect your project? Can they provide significant resources or support, or do they have the authority to approve or block your project?

Engage Your Stakeholders

Inform

Keep them updated on project progress and major milestones. Use newsletters, emails, or meetings to communicate.

Consult

Ask for their input and feedback, especially on decisions that affect them directly.

Involve

Include key stakeholders in planning and decision-making processes.

Creating a Project Plan: Steps to Outline What Needs to Be Done, By Whom, and By When

A project plan helps you organise your tasks and keep track of what needs to be done. Here's how to create one!

List All Tasks

Brainstorm Tasks

Write down everything that needs to be done to achieve your goals. Be as detailed as possible.

Organise Tasks

Group similar tasks together. For example, all promotional activities can be grouped under "Marketing."

Set Milestones

Identify Key Milestones

Milestones are significant points in your project timeline, such as "Venue secured" or "Marketing campaign launched."

Assign Deadlines

Set realistic deadlines for each milestone.

Assign Responsibilities

Determine Roles

Collaborate with the wider project team to co-create the project structure. Together, decide who will be responsible for each task, ensuring that assignments are based on team members' strengths and availability.

Create a Responsibility Matrix

Use a simple chart to match tasks with team members. This ensures everyone knows what they need to do.

Create a Timeline

Schedule Tasks

Arrange tasks in the order they need to be completed. Some tasks will depend on the completion of others, so plan accordingly.

Use a Gantt Chart

A Gantt chart is a visual timeline that shows tasks, milestones, and deadlines. It helps you see at a glance what needs to be done and when.

[\[Click here to see an example of a Gantt chart\]](#).

Monitor and Adjust

Track Progress

Regularly check the status of tasks and milestones. Are things on track, or do you need to make adjustments?

Adapt as Needed

Be flexible and ready to adjust your plan if unexpected issues arise or if tasks take longer than anticipated.

Tools and Techniques

In this section, you will learn about the types of tools and techniques available to make managing your project easier, so you can work from a clear brief, keeping you organised, within budget.

Timeline and Gantt Charts: Explanation and Examples of How to Create and Use Them

A timeline helps you visualise the sequence of tasks and milestones in your project. A Gantt chart is a type of timeline that shows tasks, their durations, and their dependencies. Everyone accesses information differently, some people prefer to create their timeline in a table or word document, while others prefer the visual aspect that a Gantt chart provides.

What is a Gantt Chart?

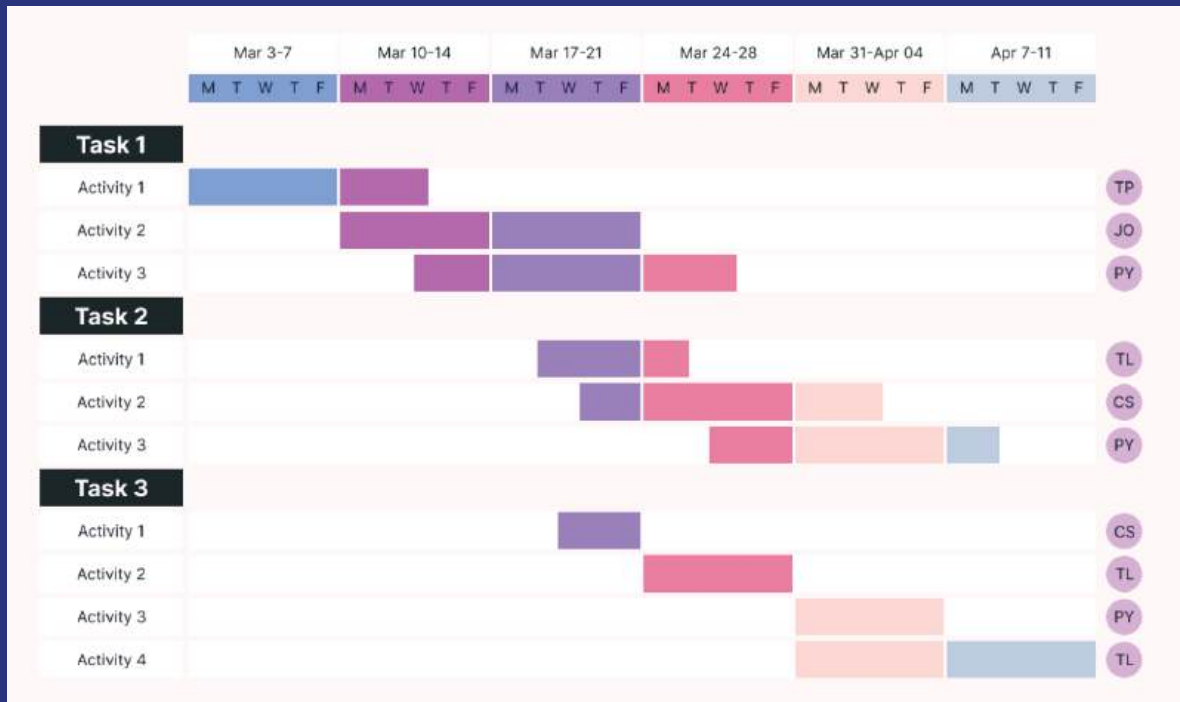
A Gantt chart displays your project schedule on a horizontal timeline. Tasks are represented as bars, with their lengths showing their durations. It also shows the relationships between tasks, indicating which tasks need to be completed before others can start.

How to Create a Gantt Chart

1. Start by listing all the tasks you need to complete for your project.
2. Estimate how long each task will take.
3. Determine which tasks depend on the completion of others.

You can create a Gantt chart using tools like Microsoft Excel, Google Sheets, or dedicated project management software like Trello or Asana. [Click here for a Gantt chart template.](#)

Example Gantt Chart



Budget Management: Tips on Creating and Sticking to a Budget, Including a Downloadable Budget Template

Managing your budget ensures that you have enough funds to complete your project without overspending.

Create a Budget Plan

List Expenses

Identify all the costs associated with your project, including materials, venue rental, marketing, and any other expenses.

Estimate Costs

Estimate how much each expense will cost, or google the products and services that you intend on purchasing for a more accurate figure. Be as accurate as possible, and don't forget to include taxes and fees. For example, forgetting to include VAT on applicable services or items will increase budget costs by 20%, which could cause problems as your project progresses.

Include a Contingency

Add a buffer (usually 10-20% of your total budget) for unexpected expenses.

Track Your Spending

Use a budget template, like a simple spreadsheet can help you track your income and expenses. Keep your budget updated as you spend money and receive funds.

Tips for Sticking to Your Budget:

Prioritise Spending

Focus on essential expenses first. If you're running low on funds, cut back on non-essential items.

Look for Discounts

Seek out discounts, sponsorships, or donations to reduce costs.

Review Regularly

Regularly review your budget to ensure you're on track and make adjustments as needed.

Use this link to download a simple template - [Budget Template](#).

Project Brief Sheet: How to Create a Project Brief that Outlines the Project's Scope, Goals, and Deliverables

What is a Project Brief?

A project brief is a document that provides an overview of your project, helping to ensure everyone involved understands the project's scope and objectives. It serves as a communication tool to align your team and stakeholders on the project's goals and expectations.

How to Create a Project Brief

Project Title and Overview

Provide a clear title and a brief description of the project.

Objectives and Goals

List the specific goals you aim to achieve.

Scope

Define what is included in the project and what is not. This helps avoid scope creep (when the project grows beyond its original objectives).

Deliverables

Specify the tangible or intangible outputs of the project.

Timeline

Provide an overview of the major milestones and deadlines.

Budget

Summarise the budget, including the total estimated cost and major expense categories.

Stakeholders

Identify the key stakeholders and their roles.

Risks and Assumptions

Highlight potential risks and any assumptions you have made in planning the project.

Use this link to download a simple template - [Project Brief Template](#).

Version Control: Ensuring Document Accuracy and Consistency

Importance of Version Control

Version control is crucial for ensuring that everyone is working with the most up-to-date version of a document. It helps avoid confusion, maintains a clear record of changes, and ensures accountability when sharing documents that have been downloaded.

Implementing Version Control

1. Naming Convention:

Use a consistent naming format: *documentname_InitialsDDMMYYYY_vX*.
Example: *ProjectBrief_DC01072024_v1* for the original and
ProjectBrief_DC04072024_v2 for an updated version.

2. Manual Version Control:

When updating a document, save it with the new version name.
Include your initials, the date, and an incremental version number.

3. Automatic Version Control:

Google Drive: Automatically tracks and saves versions.
Access via *File > Version history > See version history*.

OneDrive: Tracks and saves versions automatically.
Access via right-clicking the document and selecting *Version history*.

Best Practices

Regular Updates:

Ensure documents are regularly updated and saved with the correct version number.

Documentation:

Keep a log of changes made in each version to track updates.

Sharing:

Use shared folders (Google Drive, OneDrive) to ensure everyone has access to the latest version.

Review:

Periodically review the version history to ensure accuracy and consistency.

Execution and Monitoring

In this section, you will learn tips and strategies on how to execute and monitor your project effectively, including how to manage your time, tasks and potential risks.

Team Management: Tips on Working Effectively with a Team, Even in Small Projects or Managing Your Peers

Effective team management is crucial for the success of any project, regardless of its size. Here are some tips for working well with your team.

Clear Communication

Regular Meetings

Hold regular team meetings to discuss progress, address issues, and plan next steps.

Open Channels

Use tools like email, messaging apps, or project management software to keep communication open and accessible.

Active Listening

Encourage team members to share their ideas and concerns, and listen actively.

Clear Assignments

Clearly define each team member's role and responsibilities to avoid confusion and overlap.

Encourage Collaboration and Set ExpectationsCommunication

Team Building

Engage in team-building activities to strengthen relationships and improve teamwork.

Leverage Strengths

Assign tasks based on team members' strengths and expertise.

Performance Standards

Agree clear performance standards and deadlines for tasks.

Accountability

Hold team members accountable for their responsibilities.

Monitoring Progress: Techniques for Keeping Track of the Project's Progress Against the Plan

Monitoring progress ensures that your project stays on track and meets its deadlines. Here are some techniques for effective monitoring:

Regular Check-ins

Progress Meetings

Hold regular meetings to review progress, provide feedback, discuss challenges, and plan next steps. Schedule these meetings at the beginning of the project to ensure these meetings don't fall to the bottom of the priority pile.

Status Reports

Have team members submit regular status reports detailing their progress and any issues they've encountered.

Use Your Project Management Tools

Gantt Charts

Update your Gantt chart regularly to reflect completed tasks and upcoming deadlines.

Evaluate Milestones

Regularly review milestone achievements to ensure the project is progressing as planned.

Adjust as Needed

If milestones are not met, assess the reasons and adjust the plan as necessary.

Performance Metrics

Key Performance Indicators (KPIs)

Define and track KPIs to measure the success of your project. For example, number of tasks completed on time, budget adherence, and stakeholder satisfaction.

Budget Tracking

Regularly compare actual spending against the budget to ensure financial control.

Handling Issues Strategies for Managing Risks and Resolving Issues That Arise

Every project will encounter risks and issues. Having a plan to manage and resolve them is essential for keeping your project on track. In project management, three key variables must be balanced to ensure project success:

Resources

This includes people, money, and materials. Adding more resources can help speed up a project but may increase costs.

Time

Extending the project timeline allows for more thorough work but may delay benefits or outcomes.

Quality

Adjusting the scope or quality of the project's outputs can help meet deadlines or budget constraints but may affect the final product's standard.

Balancing these variables is crucial. If a project is behind schedule, you can; Add more resources (people, money); extend the project timeline or reduce the quality or scope of the project's outputs. Below are key steps to complete before deciding what variable will need adjusting to mitigate or manage your challenge.

Identify Risks Early

Risk Assessment

Conduct a risk assessment during the planning phase to identify potential risks.

Risk Register

Maintain a risk register that lists potential risks, their likelihood, impact, and mitigation strategies.

Use this link to download a simple template - [Project Risk Register Template](#).

Develop Contingency Plans

Plan B

For each identified risk, develop a contingency plan to address it if it occurs.

Flexibility

Be prepared to adjust your project plan as needed to accommodate changes. Changes to your plans are normal and to be expected.

Issue Resolution Process

Identify the Issue

Clearly identify and document the issue, including its cause and impact on the project.

Analyse Options

Assess potential solutions and their pros and cons as planned.

Implement Solutions

Choose the best solution and implement it promptly.

Review and Learn

After resolving the issue, review the process to learn from it and improve future issue management.

Effective Communication

Keep Stakeholders Informed

Regularly update stakeholders on risks and issues, and how you are addressing them.

Transparency

Be transparent about challenges and the steps you are taking to resolve them.

Closing the Project

In this section, you will learn how to close your project, including how to capture stakeholder feedback and present your outcomes.

Evaluation and Feedback: How to Evaluate the Project's Success and Gather Feedback

Evaluating your project's success and gathering feedback is crucial for learning and improvement. Here's how you can effectively evaluate and collect feedback:

Define Evaluation Criteria

Goals and Objectives

Compare the outcomes of your project against the original goals and objectives. Did you achieve what you set out to do?

Key Performance Indicators (KPIs)

Assess the project's performance using predefined KPIs, such as attendance numbers, budget adherence, and participant satisfaction.

Collect Data

Quantitative Data

Gather numerical data, such as the number of attendees, budget figures, and completion times for tasks.

Qualitative Data

Collect descriptive feedback from stakeholders through surveys, interviews, and focus groups.

Survey and Feedback Forms

Create Surveys

Design surveys to gather feedback from participants, team members, and other stakeholders. Use a mix of multiple-choice questions, ratings, and open-ended questions.

Distribute Surveys

Send out surveys via email or use online survey tools like Google Forms or SurveyMonkey.

Conduct Interviews

One-on-One Interviews

Conduct interviews with key stakeholders to gather in-depth feedback.

Focus Groups

Hold focus group sessions to discuss the project's strengths and areas for improvement with your stakeholders.

Analyse Feedback

Summarise Data

Summarise the quantitative and qualitative data to identify trends and key insights.

Identify Lessons Learned

Highlight what worked well and what didn't. Consider what changes could improve future projects.

Share Findings

Team Debrief

Hold a debriefing session with your team to discuss the findings and lessons learned.

Stakeholder Presentation

Present the evaluation results to stakeholders to demonstrate the project's impact and gather further input.

Reporting: Tips on Writing a Project Report and Presenting Your Results

Writing a project report and presenting your results helps document your project's journey and outcomes. Here's how to structure an effective report:

Title Page

Include the project title, date, and names of key team members.

Table of Contents

List the sections of the report for easy navigation.

Executive Summary

Provide a brief overview of the project, including the objectives, key activities, outcomes, and overall success.

Introduction

Introduce the project, including its background, goals, and scope.

Planning

Describe the planning phase, including goal setting, stakeholder identification, and project plan development.

Execution

Summarise the key activities and milestones during the project execution phase.

Challenges and Solutions

Discuss any challenges encountered and how they were addressed.

Achievements

Highlight the project's successes, including the achievement of goals and objectives.

Learnings

Reflecting on what didn't work or go to plan, and what you would do differently in the future.

Key Insights / Findings / Outputs

Discuss the key aspects from your project and the evaluation process.

Conclusion

Provide a concluding statement on the overall success of the project.

Recommendations

Offer recommendations for future projects based on the lessons learned.

Appendices

Supporting Documents: Include any supporting documents, such as survey results, interview transcripts, and detailed financial statements.

Now it's your turn!

Learning project management skills is incredibly valuable for individuals, especially in the arts and heritage sectors. These skills enhance your ability to organise, execute, and complete projects efficiently, leading to successful outcomes and personal growth. Remember, there are many different resources available to help you get started, from online courses and books to templates and software tools. Don't get stuck on one method; explore various resources to find what works best for you. Embrace continuous learning and improvement, and you'll find project management to be an empowering and rewarding skill set.

Remember, the We Don't Settle team is here to support you. Good luck! Reach out to us at info@wedontsettle.com if you want to be part of our community.



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