loddon mallee
regional palliative care consortium

# an introduction to project or event management

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*This resource has been developed as a guide for healthcare workers who may be involved in the management of a project in their workplace. As such, it does not aim to be prescriptive or complete, but to offer a series of considerations, plans, and templates which may be helpful to the project coordinator.*

*It is recognised that external agencies will in all likelihood have their own protocols, forms and requirements, which must be considered in applying for funding or in working with them. It is recognised that where relevant,* ***processes and forms used by external agencies will take precedence*** *over those described in this document.*

*This document includes thirteen attachments which are all available electronically as separate, individual forms (without footers) and which are produced in MS Word, with the exception of the* ***Project Program Logic*** *template and the* ***Project Governance Structure*** *template which are produced in MS Visio, and the* ***Project Budget*** *template which is an MS Excel document.*

*These attachments are included on a CD-ROM which is inside the back cover of this booklet.*

*The attachments are templates only, and can be readily modified to suit the particular needs of a project or individual. In producing these document templates, the aim was to provide a comprehensive template which would encompass any and all requirements of a general project. In most cases, the document template will include sections or statements which will not be required and these may be deleted or modified as required. It is also expected that some projects will be of a specialised nature and may well need content which is technical or specific to the field.*

*It is recommended that this document be reviewed on a biannual basis, with the first review occurring in February 2013.*

*The authors of this document acknowledge the contribution of the Loddon Mallee Integrated Cancer Service (LMICS) in providing the original format for several of the forms and process outlines used within this document.*

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# An Introduction to Project Management

To successfully manage a project, there are many matters to consider along the way. It is important that the key components of project management are not ignored, lest the project be abandoned or that it fails to meet its targets and goals. The early planning of a project is of vital importance to its ongoing success.

**A young boy's father approached a project consultancy firm to have them construct a swing for the boy as a birthday present. Here's how the project unfolded.....**

How the project brief was understood by the project manager

How the project worker understood the request

How the project reference group designed it

How the project engineer drew it

How the business consultant described it

How the project was documented

When the project was delivered

How the project budget was costed

How the final project was supplied to the customer

**What the customer really wanted!**

Following are some elements of managing a project which should be considered and which will assist in the successful planning, development and implementation of a project.

## 1. Definition or Project Scope

The first step in the process is that the project needs to be **clearly defined** if it is to be successful and also so that there is a clear, common understanding of the project in the organisation.

You will need to answer questions like:

**What** is the project aiming to accomplish? What are the goals or targets?

**Where** did the project originate? What is its background or history? How does it relate to current organisation policy?

**Who** will be involved in the project? Who will manage the project, as opposed to who will develop the project? Who will be the reference advisory group and who will be the steering committee members?

**When** will the project commence, finish and provide interim reports? When will significant milestones be expected?

**How** will the project be developed? How will its success be measured? What resources (people, funds, facilities, etc.) will be required to do this?

To inform others of all aspects of the project, it is necessary to develop a **Project Plan** (attachment 1) which contains all relevant information for stakeholders. This plan should provide sufficient detail to inform others without creating a huge document. It is important that this document clearly spells out the role of all people closely involved with the project and distinguishes between their respective responsibilities.

If the project requires approval for funding, or collaboration with others, it may be necessary to provide the following additional documentation:

### a. Project Program Logic

This outlines in schematic form the essence of the project. It identifies the needs, inputs and activities that are required for the project to commence, together with the outcomes (or results) in the short, medium and long term. It is also useful to include any limitations to the needs, inputs and activities (such as financial restraints, lack of facilities, etc.) and the assumptions made in planning outcomes (such as ongoing funding, access to patient data, etc.). Note that the attached **Project Program Logic template** (attachment 2) is produced using Microsoft Visio which is needed to modify the template to suit the needs of your project.

### b. Project Work Plan

The **Project Work Plan** (attachment 3) is really only a pictorial way of showing what major events or phases will take place during the project's life, when they will happen, and in what sequence they will occur. It is important to include any major milestones or key stages of the project, together with the scheduling of interim reports and major meetings. This is a very useful, visual document which often helps others understand the stages of the project.

### c. Project Governance Structure

It is always important to know clearly who is responsible for each component or action in the project, who reports to whom, and who is available in an advisory capacity. In other words, what is the "chain of command?" This is known as a **Project Governance Structure** (attachment 4) and it shows diagrammatically the connections between different stakeholders involved with the project. This diagram usually does not name individuals; rather it indicates the role or position of individuals and the generic name for organisations or professional bodies. The names of individuals who have specific roles should be listed in the **Project Plan** (attachment 1) in the relevant sections of that plan.

### d. Project Stakeholder Analysis

Conducting a stakeholder analysis is not required of all projects, but it can be a very worthwhile exercise. The aim of this exercise is to document, by using a **Stakeholder Analysis** (attachment 5), who are the stakeholders in a project, what is their respective interest, and also how does this relate to their respective influences in the project. By using a simple 2 x 2 grid, stakeholders can be categorised according to their perceived interest and influence and they can then be targeted strategically for inclusion or involvement in particular aspects of the project.

### e. Drivers and Blockers

In developing and managing a project or event, there are many situations or resources which can be seen as either drivers or blockers for the project. The names are very self-descriptive, but a driver is any resource (human, fiscal, physical or temporal) which assists in the development or implementation of the project, whilst a blocker is any similar resource which hinders the growth or implementation of the project. Some of the commonly encountered drivers and blockers are:

<u>Drivers:</u>

- Support of management (CEO, DON, Executive, etc.).
- Sufficient time to manage the project.
- Sufficient funding to develop the project.
- Effective communication and/or education.
- The project is developed from or addresses identified needs.
- The project has an identified, enthusiastic, experienced leader.
- The project is based on best-practice.
- The project operates in an atmosphere of positive morale.

<u>Blockers:</u>

- Lack of management support.
- Insufficient time to develop, finalise or implement the project – increased workloads.
- Insufficient funds to see the project through to fruition.
- Insufficient staff or human resource support to develop and/or implement the project.
- Poor communication or a lack of communication and feedback.
- Negativity toward the project from those it will impact.
- A fear of change.
- A lack of sufficient or adequate IT support.
- A lack of consultation.

It is suggested that the project worker try to maximise the drivers and develop additional drivers for the project, whilst trying to minimise the impact of blockers, preferably reducing their effects to zero. In an ideal world, it is hoped that if there are any blockers, that they can be addressed and strategies being developed which result in them becoming drivers of the project.

### f. Communication

Effective communication is a critical component of managing a project as it serves not only to keep stakeholders informed, but can also serve to circumvent any problems or issues. In managing your communication with others involved with the project, you need to consider who you will communicate with, what you will tell them, how you will tell them and when you will do this. Often there is a need for different communications to different groups of people, for example, not everyone needs or wants to know about how the budget is progressing, but most will want to know of any significant developments in the project.

It is also very important to recognise that listening is a vital component of communication. Through listening and acknowledging the input of others, a two-way communication is established. This is often formalised through feedback to other stakeholders or those who originated the communication topic.

A simple way of developing your communication strategy is to use a sequential flowchart such as is given below.

### g. Project Risk Analysis

All projects carry with them inherent risks – both positive and negative. It may be for example, that there is a risk of funding being withdrawn, or a risk of additional staff being appointed to the project unexpectedly. As a project manager, your approach for negative risks should be to reduce or minimise their impact on the project, whilst for positive risks (or opportunities) you should increase the likelihood of the risk taking place. It is important to document the **Project Risk Management** (attachment 6) and to rate each risk according to its perceived likelihood and consequence. Once a risk is identified, it is important to identify appropriate strategies which will mitigate the risk (negative risk) or enhance it (positive risk). These strategies are then built into the workplan for the project manager and should be carefully monitored. It is also appropriate to regularly review these risks and to ensure that they do not take over aspects of the project.

It is also relevant to maintain a view of the project within the "big picture," ensuring that as the project manager you are aware of where the project sits in the organisation, how it relates to organisational (or State Department) policies, and that this information is conveyed to the stakeholders of the project. As a part of this process, it is important to establish the goals and objectives of the project quite clearly so that there is no ambiguity around these. It is suggested that these be documented, using a template such as the **Project Evaluation Plan** (attachment 7 or attachment 8 – two alternatives are provided). A document such as this can be developed at the commencement of the project and should be re-visited periodically to ensure that the project is on-track.

## 2. Resources

All projects require a certain level of resources, which includes finances, time and people.

A very brief outline of the financial requirements for the project should be included in the relevant section of the **Project Plan** (attachment 1) however it is also important to have a fully developed budget for the project. This budget is best developed using a spreadsheet so that any changes can be readily incorporated without the need for lengthy calculations. An example of a project budget outline is included (**Project Budget**) as attachment 9 to this document. This budget includes some components which may not be relevant and therefore can be deleted (e.g. salaries, travel, external consultancy) and is readily modified to include additional, specific items for your project.

It is useful to include a "variance" column so that as the project develops, a watch can be kept on how expenditure is tracking against what was planned. For example, if a salary is budgeted for, it would be expected that this would be gradually expended with no anomalies – after 40% of the project has passed it would be expected that 40% of the salary budget would have been expended. On the other hand, it would be expected that the purchase of a computer might be fully expended (100%) after only one or two weeks of the project. Using the variance tracking is a good way of monitoring expenditure to see if the project will be within budget at the end of its life.

It is also important to note that if the funds are administered by an external agency (Lead Agency), if premises are provided by another agency, or salaries are a component of the project budget, then appropriate on-costs will need to be included. These will vary between agencies, but typically are in the vicinity of 15% to 30% of the item costs.

The other resources of time and people are very closely linked. As a project manager, you need to be very mindful of schedules and demands on your personal time. It is important that some very simple processes are adhered to in managing your time and that of others involved in the project. It is recommended that:

- You provide as much notice of meetings as possible – most people require at least two week's notice to be able to schedule a meeting into their diary.
- You send out agendas and minutes promptly, together with any action statements for others to follow up. Samples of these are attached as **Project Meeting Agenda** (attachment 10) and **Project Meeting Minutes** (attachment 11).
- Consideration be given to using action plans to formalise any working group processes, or as an adjunct to a meeting so that everyone is clear about who does what and when. A sample action plan, **Project Working Party Action Plan** (attachment 12) is included in this document.
- You use a system which you are comfortable with to record commitments and meetings. This can be in the form of a written diary or a software program such as MS Outlook. One very large advantage of MS Outlook is that it can be used to invite others to meetings and provide them with details of the meeting electronically.
- You maintain a system of addressing ongoing material such as correspondence, reading, research and filing. It becomes difficult when a mountain of work confronts you and you don't have sufficient time to complete it all, especially with reports and applications which have deadlines. Organisation is the key.
- You schedule time for yourself to review and reflect on the progress of the project. It is often helpful to schedule a formal appointment with yourself in your diary or planner on a regular basis (say fortnightly). In this way, you have a commitment to yourself to maintain a time for review and consideration of any unexpected items.

## 3. Putting it all into action

As the manager of a project, you will be responsible for all aspects of its development, planning, implementation, evaluation, and reporting. This does not mean however, that you do it all on your own! It is very important that you maintain constant and regular discussions with colleagues, management committee or any established working party or reference group. You should always be prepared to ask a question if you are not sure of the next step, why a decision was made, how to proceed, or how to implement a particular process. Whilst you are the manager of a project, it does not belong to an individual, but rather it is a project which is the responsibility of the host organisation.

To assist with the regular flow of information, it helps to establish a system of communication which works for you and which meets the needs of the host organisation and any reference groups or steering committees. This may mean forwarding monthly summaries of progress, minutes of planning meetings, interim results of surveys, etc. to relevant individuals and groups. Communication is the key - nothing should be a surprise to those involved with the project!

It is vital that if a process is to be implemented in an organisation (e.g. a hospital or healthcare agency) that appropriate approval is sought before the process is implemented. It is wise to discuss the proposal with relevant staff, both at a management level and at the level it will be implemented (e.g. the ward). This should all be planned at the commencement of the project and should be included in the **Project Program Logic template** (attachment 2) and the **Project Work Plan - Timeline template** (attachment 3).

## 4. Events, Meetings and Training

The key to successful management of events is in the attention to detail. The process is similar for all events, regardless of the duration (one hour or three days), audience (two or three team members or people from many agencies across the Region), or the purpose (training, information sharing or planning).

Some of the key points to note are:

a. Plan early. Start your initial planning well in advance of the event so that you do not create a stressful situation for yourself.

b. Determine the date, venue, audience for the meeting. This may be best done in consultation with members of the steering group or another project working group.

c. Let people know well in advance. Send out a draft agenda and if relevant, ask for additional agenda items.

d. Remind everyone of the event several days prior to the meeting. This is also an excellent time to send out documents, readings or reports which will be discussed at the meeting. If the agenda has changed from its draft form, it should also be sent out as a confirmed agenda for the meeting.

e. Arrive early to ensure that the room is set up as you want it. Do you want a data projector, flipchart, whiteboard, water jugs & glasses, round tables or “U shaped”, will tea/coffee be available, where are the toilets, etc. If you are using a venue outside your workplace, you should liaise with the venue organiser well prior to the event to give them a list of your requirements for the meeting.

f. Bring several spare printed copies of the agenda (people often neglect to bring their own copy) and any other relevant documents.

g. Appoint a chairperson and a separate note or minute taker. Make sure that they stick to the agenda and do not let the meeting run beyond its stated finish time. You should try to arrange this before the meeting – no-one likes to be asked to chair a meeting which they have just arrived at!

h. If the meeting is to be of more than about 1½ hours duration, plan for a "tea/coffee/toilet break" in the middle of the meeting.

i. Be prompt in sending out minutes of the meeting, together with any action statements which will need to be followed up.

j. If the event is a training workshop or seminar, ensure that you have an evaluation form for all participants to complete. A suggested format for an **Activity Evaluation template** (attachment 13) is included at the end of this document.

## 5. Evaluation and Reporting

A crucial component of all projects is the final stage of evaluation of the project, together with the production of a final report. The evaluation **needs to be planned at the commencement** of the project as it is often very desirable to compare data obtained at the outset with similar data from the end of the project. In this way a valid comparison can be made as to the effectiveness of the project and possible recommendations for the future beyond the project. The evaluation can make use of qualitative data (comments, thoughts, opinions, etc.) or it can use quantitative date (numbers, survey responses, measured data, etc). Both are equally valid but the evaluation instrument (survey, interview, etc.) must be well planned before the project gets under way. It is possible to revise an evaluation instrument during a project but this should be done with care as it may lead to two sets of data which cannot be compared effectively as they may measure different things.

If the project is of significant duration, it is often desirable to have an interim report or reports. These reports should take place at major milestones of the project (e.g. at the conclusion of initial data collection and analysis, at the conclusion of a pilot program, etc.). These reports need not be lengthy, but simply a quick snapshot of progress to date. They should however indicate any major happenings, positive outcomes or possible blockers that may be anticipated.

All reports should also include a financial report of expenditure to date and an indication of how the project is tracking according to the proposed budget. One way in which this can be accomplished is by using the **Program Budget template** (attachment 9) which is also able to calculate variance within the budget.

In producing a final report of the project, there are several sections which can be included. The inclusion of these sections is dependent on the length of the report, the detail of information included and by the author's preferences, but can include:

- Title page – serving as a cover page and providing the name of the project, date of the project, and possibly the project manager's contact details.
- Table of contents – indicating all sections of the report and their referenced page numbers. This may be omitted if the report is less than about 10 pages.
- Executive summary – a brief summary of the major findings together with any recommendations.
- Body of the report – detailing the project findings, processes and outcomes.
- Recommendations – a detailed outline of recommendations for future development of the project beyond the end of the actual project. In some cases this may not be relevant or required.
- Conclusion – a review of the project and summary of the situation at the end of the project
- Bibliography – listing all articles referred to within the body of the report. Note that there are recognised formats for developing a bibliography; these can be found through relevant websites or professional organisations.
- Appendices – it is sometimes useful to attach tables, charts, diagrams and other lengthy notes as appendix documents at the end of the report. In this way they reader is able to read the report without interruption but can choose to read the appendices if they wish.

- List of abbreviations and/or glossary – this may be appropriate if the report is to go to others outside the sphere of the project's delivery (i.e. to others who may not be familiar with the acronyms or abbreviations which are used throughout the report).

If the report is lengthy, it is often helpful to include page numbers at the foot of each page, in this way readers can readily reference comments to a particular page.

## 6. But I need HELP !!

At some stage of your project, you may need help or advice. There are many sources of assistance or reference which are available, but it is most important that you recognise that you need help, don't understand or are just a bit confused by it all. One of the most available sources of help is often your work colleagues. You should always speak up if you are in a meeting and don't understand what is being asked of you, or what is proposed by another person. This is crucial in the early stages of a project when you are planning. The project objectives for example, must be very clear to you and everyone involved or you run the risk of people working to meet different targets and outcomes. There are also many web-based points of reference which can provide you with assistance on specific topics. Some of these are listed below.

| | |
|---|---|
| General | http://www.projects.uts.edu.au/resources/index.html (Provides papers & articles; website links; templates& tools; policies & guidelines) |
| | http://www.egovernment.tas.gov.au/project_management/supporting_resources/templates |
| Bibliographies | http://www.ccb.vic.edu.au/resources/library/Bibliography.html |
| | http://www.library.uq.edu.au/training/citation/harvard_6.pdf |
| | http://www.lc.unsw.edu.au/onlib/annotated_bib.html |
| | http://www.globaleducation.edna.edu.au/globaled/page1873.html |

| | |
|---|---|
| Budgets | http://www.brighthub.com/office/project-management/articles/61658.aspx |
| | http://www.ehow.com/how_7713557_develop-simple-project-budget.html |
| Meetings | http://youthservicestoolkit.com.au/YouthServices/RunningMeetings.html |
| | http://www.communitybasedresearch.ca/resources/How%20to%20make%20logic%20models%20in%20Microsoft%20Powerpoint.pdf |
| Stakeholder Analysis | http://www.scu.edu.au/schools/gcm/ar/arp/stake.html |
| | http://www.dse.vic.gov.au/DSE/wcmn203.nsf/LinkView/86D3534A103DB113CA257089000A2FB3B3D050C7331FFEBBCA257091000FEF77 |
| Templates | http://office.microsoft.com/en-us/templates/templates-FX101741961.aspx?CTT=97 |
| | http://www.projects.uts.edu.au/resources/templates.html |
| | http://www.businessballs.com/project%20management%20templates.pdf |
| Work Plan | http://www.endowmentforhealth.org/uploads/documents/WkPlan_Guidelines.pdf |

There are also many excellent books available on the subject of project management, two of which are:

Kent H. Bowen, 2002. *Project Management Manual*, Harvard Business School Publications, 9-697-034, 39 pp.

Dwyer J, Stanton P & Thiessen V, 2004. *Project Management in Health and Community Services*, Crows Nest, NSW: Allen & Unwin, 200pp. paperback $45.00

## 7. Templates and Forms

The following templates are provided as a guide to assist in the management of your project. They are readily changed and modified and you should feel free do this to suit the specific needs of your project.

**Attachment 1 - Project Plan template**

**Attachment 2 - Project Program Logic template**

**Attachment 3 - Project Work Plan (Timeline) template**

**Attachment 4 - Project Governance Structure template**

**Attachment 5 - Stakeholder Analysis template**

**Attachment 6 - Project Risk Management template**

**Attachment 7 - Evaluation Plan template (1)**

**Attachment 8 - Evaluation Plan template (2)**

**Attachment 9 - Project Budget template**

**Attachment 10 - Project Meeting Agenda template**

**Attachment 11 - Project Meeting Minutes template**

**Attachment 12 - Project Working Party Action Plan template**

**Attachment 13 - Activity Evaluation template**

**Attachment 1 - Project Plan template**

# *(PROJECT TITLE) PLAN*

| |
|---|
| ***1. PROJECT TITLE*** |
| What is the name of the project? |
| ***2. PARTICIPATING ORGANISATIONS*** |
| Who will be involved in the development, delivery and/or implementation of the project? |
| **3. Background** |
| Why is this project being implemented, what is already happening, what are the gaps, why should they be addressed, how will this be done? |
| **4. PROJECT OVERVIEW, AIMS & OBJECTIVES** |
| A general description of the project, what it aims to do or deliver. |
| **5. SCOPE (INCLUSIONS & EXCLUSIONS)** |
| What or who will be included in the project, particularly when it is implemented or delivered; who or what will be excluded from the project. This can include geographic areas, organizations, etc. |
| **6. LINKAGES TO KEY STRATEGIES** |
| Write key strategies of your organisation that this project addresses |
| **7. Key Tasks, Deliverables & Timeframes** |

| What will be done ... | When ... |
|---|---|
| | |
| | |

| |
|---|
| Also refer to work plan attachment. |
| **8. INTELLECTUAL PROPERTY CONSIDERATIONS** |
| The project will remain the intellectual property of the authors and their organisations, with due acknowledgement of previous work by others. |
| **9. COMMUNITY PARTICIPATION** |
| Will you have community representatives on the steering committee? If not, how are you seeking participation from the community? Do you want/need community representation? |
| 10. **STAKEHOLDER ENGAGEMENT STRATEGY** |
| How will you engage people? How will you engage people for sustainability?<br>Also refer to stakeholder analysis attachment. |

| 11. GOVERNANCE |
|---|
| Mechanism of reporting to Governance Group on project progress and finances. |

## 12.Risks & Risk Management (Control)

Identify any expected risks (financial, operational, technical, governance, sustainability, engagement) and how they might be expected to me addressed or minimised.

Also refer to project risk management attachment.

## 13.Evaluation Plan

**Project Reach**

Where and who will the project be delivered to or implemented with. How will the effectiveness of this aspect of the project reach be measured.

**Project Quality**

How will the quality of the final project be measured?

Also refer to project participant evaluation, project evaluation & program logic attachments.

## 14.Sustainability

How will the long-term sustainability of the project be ensured? What plans for future growth or sustainability of the project are there?

### 15. PROJECT COSTS

| Project Item & Justification | Costs |
|---|---|
| Project Officer | $ |
| Consumerables | $ |
| Travel, accommodation | $ |
| Publication, production | $ |
| External costs, consultancy, etc. | $ |
| Contingency | $ |
| **TOTAL** | **$** |

## 16.Project Team (Including Roles)

Who are the members of the project team?

## 17.Project Organisation & Control

| Steering Committee Members | Working Party Members |
|---|---|
| i. | i. |
| ii. | ii. |

**Attachment 2 - Project Program Logic template**

**Attachment 3 - Project Work Plan (Timeline) template**

***{PROJECT TITLE}***

*WORK PLAN*

| DATE | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | | | 2011 | | | | | | | | |
| **Project Activity** | Nov | Dec | Jan | Feb | Mar | Apr | May | June | July | Aug | Sept | |
| 1. | | | | | | | | | | | | |
| 2. | | | | | | | | | | | | |
| 3. | | | | | | | | | | | | |
| 4. Progress report 1 | | | | | | | | | | | | |
| 5. | | | | | | | | | | | | |
| 6. Progress report 2 | | | | | | | | | | | | |
| 7. | | | | | | | | | | | | |
| 8. | | | | | | | | | | | | |
| 9. | | | | | | | | | | | | |
| 10. | | | | | | | | | | | | |
| 11. | | | | | | | | | | | | |
| 12. Final report | | | | | | | | | | | | |

**Attachment 4 - Project Governance Structure template**

## (Project Name) Governance Structure

**Attachment 5 - Stakeholder Analysis template**

## {PROJECT TITLE}

## Stakeholder Analysis

| Stakeholder Organisation | Name of Key Individual(s) | Potential Project Role(s) | Stakeholder Matrix Position (X) | | | |
|---|---|---|---|---|---|---|
| | | | HIGH Influence | HIGH Influence | LOW Influence | LOW Influence |
| | | | HIGH Interest | LOW Interest | HIGH Interest | LOW Interest |
| 1. | | | | | | |
| 2. | | | | | | |
| 3. | | | | | | |
| 4. | | | | | | |
| 5. | | | | | | |

| Stakeholder Interest Level | Stakeholder Potential Influence Level: High | Stakeholder Potential Influence Level: Low |
|---|---|---|
| High | ↑ ↑ **High Influence & High Interest**<br><br>Strategy:<br>Maintain support, refine communications to align with project goals, leverage stakeholder influence. | ↓ ↑ **Low Influence & High Interest**<br><br>Strategy:<br>Provide information, status updates. |
| Low | ↑ ↓ **High Influence & Low Interest**<br><br>Strategy:<br>Actively engage, target communications to align with project goals, leverage stakeholder influence. | ↓ ↓ **Low Influence & Low Interest**<br><br>Strategy:<br>Passive relationship management. |

## Attachment 6 - Project Risk Management template

# {PROJECT TITLE}
# RISK MANAGEMENT

| Likelihood | |
|---|---|
| 5 | Certain |
| 4 | Likely |
| 3 | Possible |
| 2 | Unlikely |
| 1 | Rare |

| Consequence | |
|---|---|
| 5 | Extreme |
| 4 | Major |
| 3 | Moderate |
| 2 | Low |
| 1 | Negligible |

**Risk Rating**

| Likelihood | Consequence 5 | 4 | 3 | 2 | 1 |
|---|---|---|---|---|---|
| 5 | Extreme | Extreme | High | Medium | Medium |
| 4 | Extreme | High | High | Medium | Low |
| 3 | High | High | Medium | Medium | Low |
| 2 | Medium | Medium | Medium | Low | Low |
| 1 | Medium | Low | Low | Low | Low |

| Action area | Risk Implications | Likelihood | Consequence | Risk Rating | Risk Minimisation Strategy |
|---|---|---|---|---|---|
| **Financial:**<br>1. | | | | | |
| **Sustainability:**<br>1. | | | | | |
| **Operational:**<br>1. | | | | | |
| **Technical:**<br>1. | | | | | |
| **Engagement:**<br>1. | | | | | |
| **Governance:**<br>1. | | | | | |

**Attachment 7 - Evaluation Plan template (1)**

## {PROJECT TITLE}
## Evaluation Plan

| Objective | Indicators of Project Success | Methods | By Whom, From Whom |
|---|---|---|---|
| • What changes or differences will the project make?<br>• Objectives should be specific, measurable, achievable, realistic and time-limited. | • How will you show progress toward the objective?<br>• How will you know if you have achieved the objective? | • How will you measure the achievement of this objective?<br>• How will you collect information about the indicators?<br>• When and where will information be collected? | • Who will do this evaluation activity?<br>• Who will be asked for their input? |
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |

**Attachment 8 - Evaluation Plan template (2)**

**{PROJECT TITLE}**

EVALUATION PLAN

| Program Goals | Objectives | For Program Goal: | | For Each Objective: | |
|---|---|---|---|---|---|
| | | Outcome Indicators | Data Collection Methods | Impact Indicators | Data Collection Methods |
| 1. | i. | | | | |
| | ii. | | | | |
| | iii. | | | | |
| 2. | i. | | | | |
| | ii. | | | | |
| | iii. | | | | |
| 3. | i. | | | | |
| | ii. | | | | |
| | iii. | | | | |
| 4. | i. | | | | |
| | ii. | | | | |
| | iii. | | | | |

**Attachment 9 - Project Budget template**

## (Project Name) Budget

| Expense Category | Planned Expense | Actual Expense to Date | Variance |
|---|---|---|---|
| Salaries | | | |
| Project officer | $0.00 | $0.00 | 0% |
| Administration | $0.00 | $0.00 | 0% |
| On-costs (super, administration, insurance, etc.) | $0.00 | $0.00 | 0% |
| Consumerable Items | | | |
| Stationery | $0.00 | $0.00 | 0% |
| Printing, copying | $0.00 | $0.00 | 0% |
| Postage | $0.00 | $0.00 | 0% |
| Other | $0.00 | $0.00 | 0% |
| Travel, accommodation | | | |
| Travel, accommodation | $0.00 | $0.00 | 0% |
| Accommodation | $0.00 | $0.00 | 0% |
| Meals | $0.00 | $0.00 | 0% |
| Parking, other | $0.00 | $0.00 | 0% |
| Office | | | |
| Office lease/hire | $0.00 | $0.00 | 0% |
| Furniture | $0.00 | $0.00 | 0% |
| Communication equipment | $0.00 | $0.00 | 0% |
| Publication | | | |
| Printing, copying | $0.00 | $0.00 | 0% |
| Marketing | $0.00 | $0.00 | 0% |
| External costs | | | |
| Consultancy | $0.00 | $0.00 | 0% |
| Venue hire | $0.00 | $0.00 | 0% |
| Equipment, resources | | | |
| Computer | $0.00 | $0.00 | 0% |
| Phone | $0.00 | $0.00 | 0% |
| Office requirements | $0.00 | $0.00 | 0% |
| Other | $0.00 | $0.00 | 0% |
| | | | |
| Contingency | $0.00 | $0.00 | 0% |
| | | | |
| Miscellaneous | $0.00 | $0.00 | 0% |

| | | | |
|---|---|---|---|
| **Total Expenses** | **$0.00** | **$0.00** | **0%** |

Date of budget review: (Insert date of review)

**Attachment 10 - Project Meeting Agenda template**

# (PROJECT TITLE) MEETING AGENDA

| | |
|---|---|
| **Meeting date:** | |
| **Time of meeting:** | |
| **Meeting venue:** | |

| | |
|---|---|
| **Present:** | |
| **Minutes taken by:** | |
| **Apologies:** | |

**Previous minutes:**

"That the minutes of the previous meeting of (insert date) as circulated, be confirmed as a true and accurate record of that meeting."

Moved:

Seconded:

Carried Yes/No

**Business Arising from Previous Minutes:**

1.
2.

**Correspondence:**

Inward:

1.
2.

Outward:

1.
2.

"That the inward correspondence be accepted and outward correspondence endorsed."

Moved:

Seconded:

Carried Yes/No

**Action from Correspondence:**

1.
2.

**Reports:**

1. Project manager's report
2. Financial report
3. Other

"That all reports be accepted and endorsed as tabled."

Moved:

Seconded:

Carried Yes/No

**Matters for Decision:**

1. Strategy decisions
2. Routine decisions
3. Other

**Matters for Discussion:**

1. Current Significant Issues
2. Matters for Approval
3. Forthcoming Strategic Directions
4. General Business
5. Other matters

**Next meeting:**

| | |
|---|---|
| Date of next meeting: | |
| Time of next meeting: | |
| Venue for next meeting: | |

**Attachment 11 - Project Meeting Minutes template**

# (PROJECT TITLE) MEETING MINUTES

| | |
|---|---|
| **Meeting date:** | |
| **Time of meeting:** | |
| **Meeting venue:** | |

| | |
|---|---|
| **Present:** | |
| **Apologies:** | |
| **Chairperson:** | |

**Previous minutes:**

"That the minutes of the previous meeting of (insert date) as circulated, be confirmed as a true and accurate record of that meeting."

Moved:
Seconded:
Carried Yes/No

**Business Arising from Previous Minutes:**

1.
2.

**Correspondence:**

Inward:

1.
2.

Outward:

1.
2.

"That the inward correspondence be accepted and outward correspondence endorsed."

Moved:
Seconded:
Carried Yes/No

**Action from Correspondence:**

1.
2.

**Reports:**

| |
|---|
| Reports tabled included-<br>1. Project manager's report<br>2. Financial report<br>3. Other ... list |

| | | |
|---|---|---|
| | Moved: | |
| "That all reports be accepted and endorsed as tabled." | Seconded: | |
| | Carried | Yes/No |

**Matters for Decision:**

| |
|---|
| 1. Strategy decisions<br><br>2. Routine decisions<br><br>3. Other |

**Matters for Discussion:**

| |
|---|
| 1. Current Significant Issues<br><br>2. Matters for Approval<br><br>3. Forthcoming Strategic Directions<br><br>4. General Business<br><br>5. Other matters |

**Next meeting:**

| | |
|---|---|
| Date of next meeting: | |
| Time of next meeting: | |
| Venue for next meeting: | |

**Attachment 12 - Project Working Party Action Plan template**

| **{PROJECT TITLE}**<br>Working Party Action Plan – Model 1 |
|---|

| *Working Party Meeting* | *(Insert venue of meeting)* | *(Insert date of meeting)* |
|---|---|---|

| | | | | | |
|---|---|---|---|---|---|
| **HOW?** | • What resources will be needed?<br>• Will an external audience be drawn upon, surveyed, etc? | | | | |
| **WHERE?** | • Where will this take place (meetings, surveys, etc.)? | | | | |
| **WHEN?** | • When is this expected to be completed by or reported upon? | | | | |
| **WHAT?** | • What are the details of this particular action?<br>• What is the expected outcome? | | | | |
| **WHO?** | • Who will be responsible for this particular action?<br>• This may be more than one person. | | | | |

| **{PROJECT TITLE}**<br>Working Party Action Plan – Model 2 |
|---|

| | | |
|---|---|---|
| **Priority Name:** | | |
| **Goal:**<br>(What is to be achieved) | | |
| **Assumptions:**<br>(Key Assumptions affecting the plan) | **Objectives:**<br>(What success will look like) | |
| 1.<br>2.<br>3. | 1.<br>2.<br>3. | |
| **Task start date:**<br>(Anticipated or estimated) | **Task end date:**<br>(Target or estimated) | |
| | | |
| **Priority Actions:**<br>(What has to be done) | **Action dates:**<br>(When) | **Action team:**<br>(By whom) |
| 1.<br>2.<br>3. | | |
| **Priority Team:**<br>(People involved) | **Resources:**<br>(to be acquired) | |
| Responsible:<br><br>Involved: | | |
| **Funding & Budgetary Requirements:**<br>(The money) | | |
| **Item Description:** | **Estimated Cost:** | **Required When:** |
| 1.<br>2.<br>3.<br>4. | | |
| **Notes:** | | |

**Attachment 13 - Activity Evaluation template**

The Loddon Mallee Region Palliative Care Consortium (LMRPCC) seeks to evaluate and improve education services. We will value your responses to this short survey. This is an anonymous survey – you are not required to provide any information that would identify you in any way.

| | **Please rate the level to which you agree with the following statements:** | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree | Not Applicable |
|---|---|---|---|---|---|---|---|
| 1. | The method of education delivery was suitable for this topic. | 1 | 2 | 3 | 4 | 5 | N/A |
| 2. | This education was held at a suitable date and time.<br>If not, why not? | 1 | 2 | 3 | 4 | 5 | N/A |
| 3. | The length of the education was appropriate. | 1 | 2 | 3 | 4 | 5 | N/A |
| 4. | I received assistance when required. | 1 | 2 | 3 | 4 | 5 | N/A |
| 5. | Handouts and information provided were useful. | 1 | 2 | 3 | 4 | 5 | N/A |
| 6. | I found the following content categories useful or relevant: | | | | | | |
| | a. content i | 1 | 2 | 3 | 4 | 5 | N/A |
| | b. content ii | 1 | 2 | 3 | 4 | 5 | N/A |
| | c. content iii | 1 | 2 | 3 | 4 | 5 | N/A |
| | d. content iv | 1 | 2 | 3 | 4 | 5 | N/A |
| 7. | I now feel more able to address the (.....) needs of people that I deal with in my professional or volunteer role. | 1 | 2 | 3 | 4 | 5 | N/A |
| 8. | I had enough opportunity for questions and discussions related to (.....). | 1 | 2 | 3 | 4 | 5 | N/A |
| 9. | My learning needs were met. | 1 | 2 | 3 | 4 | 5 | N/A |
| 10. | Please rate the level of knowledge you had about (.....) before attending this event: | 1 | 2 | 3 | 4 | 5 | |
| | | Low ← | | | | → High | |
| 11. | Please rate the level of knowledge you feel you have about (.....) since attending this event: | 1 | 2 | 3 | 4 | 5 | |
| | | Low ← | | | | → High | |

*Continued over .....*

| | | | |
|---|---|---|---|
| 12. | Which aspects of this event were most useful to you? | | |
| 13. | What would you like to see changed about the content of the education (if anything)? | | |
| 14. | There are additional education topics that I would like presented.<br><br>If Yes, please list them: | Yes | No |
| 15. | Had you heard of LMRPCC before this event? | Yes | No |
| 16. | Do you have any further comments: | | |

**Thank you for your time and comments.**

**Please return completed surveys to the survey return box.**