



## Surviving change in social housing.

### Part 2 – The role of governance in business change projects.

In part 1 of this series on surviving change in social housing we covered the role leadership plays. The key message from that article is that we need to see more from the leaders of landlords in helping to drive the cultural aspects of implementing change. It focused a lot on the set-up of change projects.

This article will also focus on the early stages of change initiatives, but also how to govern them moving forward.

The thing about projects and especially systems change projects in social housing is that many are thrown together without little due care on how to properly manage them. I have seen projects that have ill equipped and very inexperienced staff 'running' them. It is rarely this staff members fault. With very little experience of project management in landlords up and down the country, it is not unusual that someone finds themselves in a role they have a lack of experience in.

If a landlord has no choice and has to go down the route of using staff to manage a change project then the role of project governance has an even more critical role than normal. In fact, even if you have some experienced project managers then it's the same.....they should not be working through projects without the right governance in place.

So, what is project governance. Well, in my own opinion and experience, project governance is simply the set of overarching rules and guidelines on how the overall project will be 'controlled'. There are plenty of definitions, but that is what it all comes down to, the rules and control.

What then are these rules, and how does it apply to change projects in social housing.

If you have ever watched Grand Designs, the ones who seem to make it difficult are the ones who try and project manage the build themselves. It may be a budgetary constraint that they cant afford a project manager, or it may just be vanity and they want to be the boss. Fair enough. But I wonder how many would have saved time, prevented mistakes, and not gone over budget if they employed a rigid governance structure, instead of winging it. Well, this is the same in any business in any sector, but for the relevance of this post we will use our own sector of social housing.

There is a great deal of project governance that applies to any project, of any size, and in any sector. We will cover these, as they are the basics and the bedrock of setting up a control structure that will undoubtedly help you make your project a success.

Let's get the party started!!!

First step: Forget about Prince. All you need is common sense.

Right, as we covered in part 1, now that the leadership has signed it off and done their motivational stuff, you need to get on with it.

And in good old traditional DtL style I am distilling it all into 5 key areas.

1. Documentation.
2. Communication.
3. Planning.
4. Reporting.
5. People.

For this article, I've left out some other areas such as Risk, Change control and so on. The reason is simple. I wanted to do 5 steps. That's all.

#### Documentation:

Maybe it would surprise you to find that some of the following, essential documentation, doesn't even seem to have been thought of in some projects. Let's cover the documentation we feel is critical.

I have always believed that the earliest stage in any project is the business case, or perhaps even what is termed the Project Initiation Request. Remember that spark we talked about in Part 1, its right after that. I don't in all honesty think you need both as you can roll them into one, but you do need a document that captures why you need to do it, what it is expected to cost, timelines and risks. It is in the main the document that should tell the company the Why the What and How you are going to do it all.

The PID (Project Initiation Document) is in my opinion the most important document. It contains the goals, the general scope, team structure and board structure and their roles. It should list the controls, reporting, risk management, change management and so on. It is what I call the project bible. It is the key reference point.

There is then the other key documents. They are the working/control documentation unlike the ones above that are the highest level structure documentation. These control documents are:

The **Gantt chart**, the plan in other words. Now, hands up who has seen a Gantt chart at the start of a project and then never again. It is one of the most misused documents in any plan. So, if you are going to use one, then use it properly. There are many online courses on how to use Gantt charts. And by the way, you don't always use Microsoft Project. It is an overly engineered piece of software that, like excel gets used in most projects nowhere near its capacity and incessant functionality. Seek and you will find much cheaper and perhaps even free software.

The next is what I call the **Control Document**. This is one single place, a spreadsheet, an online collaboration tool or some custom software that like Project will cost you a fortune. The simplest method is a spreadsheet that contains different areas such as

Now, if you know what you are doing here, you can export back and forward between the project plan software and excel on the tasks side.

The other areas the control document should contain are risk management, issues management and change control. If you are also good with then software tools you can make this work as the testing control document, if perhaps it is a software implementation that you are managing.

The last one that so many miss is the **communications plan**. This, in my own experience is vital, and the one that gets forgotten about most. How you communicate to your customers and stakeholder, different parts of the business, or indeed the whole business, the third parties involved, the supplier who's products/services you are working on, your own project team is so important that without it, you will find it impossible to get the best out of your project.

You can see there is a fair bit of work to do, but if you don't you'll end up in Grand Designs.

There are other documents some like to use in Project Management, but the above will get you by, and help you structure and manage your project effectively.

### Communication

The last document above leads naturally to the area of communicating. Some projects fall to pieces over this area alone.

'I didn't know'

'I didn't realise'

'I am not sure who is doing what'

'Are you sure the project team meeting was today'

'I thought testing started next week'

There you go, point made in the area of communication. All you need to do is map out how you are going to let folks know what is happening, when it is happening, what regularity or frequency you will have your meetings. Will you use visual techniques on walls to update on milestones, will you use an intranet, a comms tool or the likes. You get the drift.

### Planning:

Ok, we talked about the Gantt chart, but this is only the output of the planning process.

Planning is much more than working out the tasks and who does what, and when. Or is it? In its simplest form, yes that what it is about. However, planning should be an all-encompassing thing. A lesson learned over my many years in business is that too few

people, in fact sometimes only one person, does the planning. No wonder then that the communications breaks down. Planning works best when those that will be involved in the project are actually involved in the planning . There are many techniques to getting the plan built. My own favourite is the 'Blue Peter' approach. This involves the sellotape and the big rolls of backing paper tapped to a wall, and you then get the post it notes to get the ideas out of folks heads and on to the sheets. There are many tips to making this work, but I'm not telling you. It is after all one of our secret business techniques.

### Reporting:

Like many things in life, and certainly business, you learn from others. I once worked with an Irish project manager (probably one of the best I have ever seen) who used a one page project reporting technique that to this day is the best I have seen. Not only was he a great project manager, but the man I have had a shower with on the roof of a Rio hotel. No, its not what you think!

Reporting is so important in not only it's role as part of the communication plan, but it deserves a mention itself. Reporting on a projects performance is crucial to all involved, if done well of course. I said 'projects performance' instead of progress as I believe there is a distinct difference.

Reporting on progress is easy....just say you have done this task, and done that task, or a bit behind on that task. Easy.

Performance however, covers everything. It should talk about not only the tasks, but also costs/budgets, risks, upcoming activities and perhaps even some specific areas such as testing, training, when the time is right. And remember, all in one page.

### People:

And finally, we have talked about documentation and planning, reporting and communication, but the one thing that keeps a project real is the people. You need the right people. You sometimes need to treat people like humans, and not task ticking robots, and you need to ensure people know what they are doing. See, I told you communication was important.

The other aspect about people is that when looking at the roles and those staff you have available, sometimes it is really effective to not always go for the obvious choices. Here are a few examples of people, and their roles.....

- Junior staff are more enthusiastic. Fact! Use these staff, and soak in their ability to learn and want to do a good job.
- Listen to everyone involved, and don't be one of those 'dictating' project managers that simply tell everyone what they should do.
- People should be allowed to be open and honest in their roles. Again, like above, the best projects are the ones where they work as a team, and not as a set of individuals. Do some daft things. Have project challenges. Have some nights out. Have some pizza lunches (on the PM of course), and my own personal favourite, make the best performing team member wear a yellow jersey. And with that final point, like at a primary school, make sure everyone gets the prize at some point.

So, the last point is where we will leave it, and that is that projects can be fun.