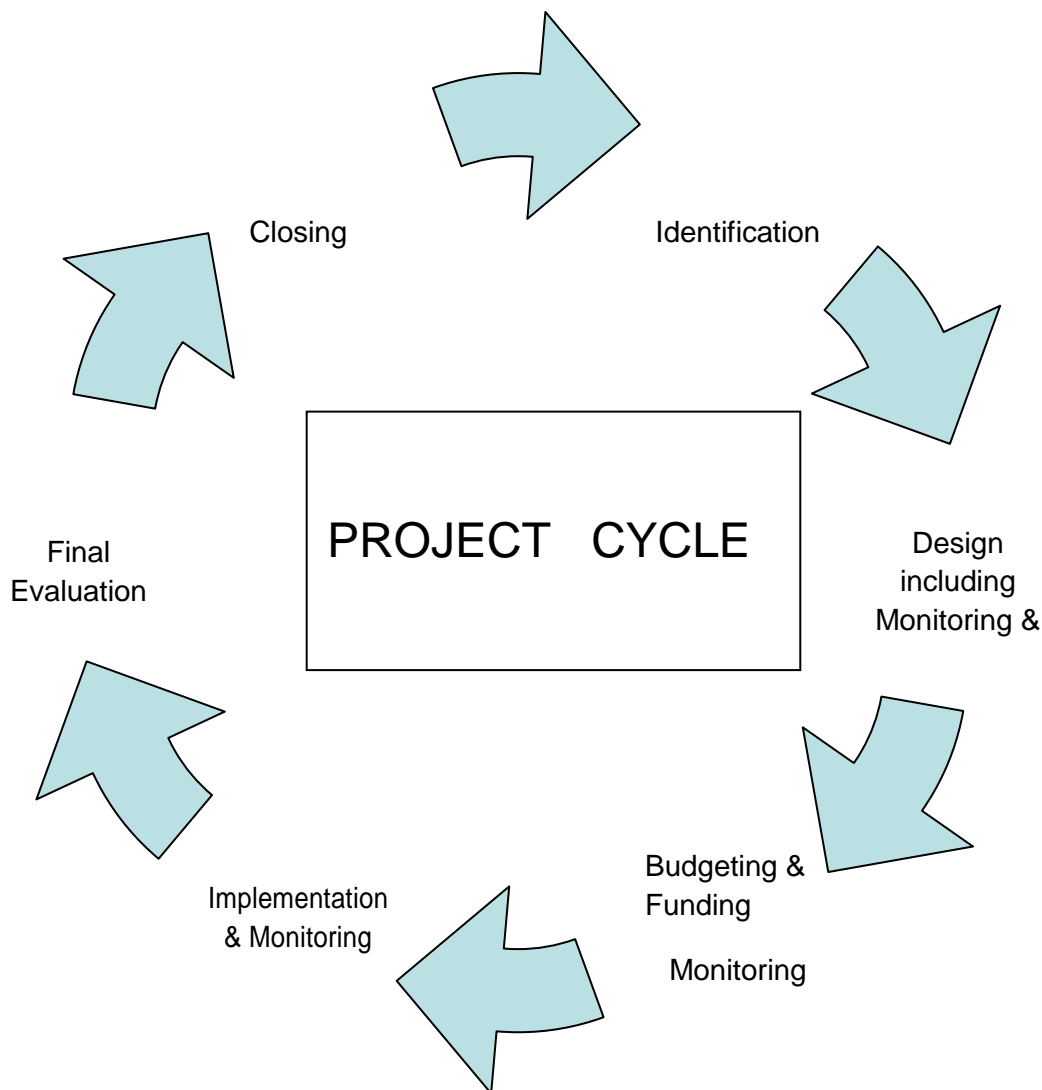


PROJECT MANAGEMENT – IDENTIFICATION: Stage 1



This guide aims to give a brief overview of the project management cycle and some handy tips to consider when you are planning and implementing a project. Identification, design and budgeting/funding are the steps that make up your planning process. The planning process should make up a significant part of the whole cycle in order to ensure a successful project. The diagram below indicates the different stages of the project cycle.

Project Cycle



Identification

Project identification results from *issues emerging from the external environment*. You might pick up on these issues in the environment by reading reports on trends in the geographical area where you work and speaking to stakeholders (including users) about the local issues arising.

Examples of new issues that might be relevant to your organisation:

- a new user group
- changes in government policy that affect your user group
- a new event – eg Olympics
- a new advocacy theme – ie lobbying the council for increased fitness services for Muslim women
- a new problem/issue that affects your user group

Key Steps in Identification

There are three steps in the identification process:

1. scanning the external environment for issues
2. undertaking preliminary research on an issue
3. making a decision

1. Scanning the external environment for issues

Scanning is a key part to planning projects since it can help to identify areas where your organisation is best placed to work. Scanning is like skim reading. You are on the lookout for new issues, but at this stage do not yet need to research deeply about the issues. Scanning can be done by internal or external stakeholders. Scanning can occur through such examples as:

- stakeholder discussion groups with partner organisations, users, funders
- project design, evaluation and learning exercises (from previous discussions)
- inter-organisation forums e.g. Westminster Community Network
- conducting contextual analyses including political, economic, social and historical factors eg PESTLE¹
- analysis of major government policies that make an impact on an issue
- lobbying by external stakeholders
- lobbying by internal stakeholders such as staff, volunteers or supporters interested in health or fitness schemes for Muslim Women
- sudden or unexpected changes in the external environment affecting your organisation – for example changes in the funding environment as a result of the recession.

2. Undertaking preliminary research on an issue

The purpose of research at the identification stage is to help your organisation decide whether or not to begin to work on an issue (ie whether to move from the identification stage to the design stage of the project cycle). Preliminary research should not aim to be comprehensive in breadth or depth because further research will be undertaken during the design stage. The research can include some of the steps below:

¹ For more information on PESTLE see strategy planning worksheet



- exploring a new geographical area of work or a new user group
- a review of current literature/information of the specific group/issue/region – this might be, for example, a report from Westminster City Council on fitness/health in Westminster
- consultation with relevant external stakeholders - individuals and organisations - who have experience working on the issue or in a particular area.

This information should be summarised so that an informed decision can be made by your organisation to move to the next stage.

3. Making a decision

Relevant staff or volunteers in your organisation (perhaps they are the trustees?) will use this summarised information to decide whether the project should go to the next stage.

Checklist

Below are some useful questions to consider for your organisation when making a decision to go forward with a new project

Checklist: Should we go ahead?

1. Is there an existing need?
2. Is the issue consistent with our organisational aims and mission? Does it fit with our strategic objectives?
3. Does our organisation already have commitments on the issue?
4. Can our organisation add value to what other organisations are already doing? How?
5. Does our organisation have prior experience of the issue?
6. Are other organisations better placed to take on this issue?
7. Does our organisation have enough staff time, skills and knowledge to effectively take up this issue, or can these be developed?
8. Does our organisation have the financial resources to implement the project? Or are funding opportunities available?
9. Does our organisation have the necessary systems in place for this project?
10. Does our organisation have partnerships or collaborations in place to help with this project?
11. Are there risks to staff, partners or users and, if so, can these be managed effectively?
12. What will happen if our organisation does nothing?
13. What are the opportunity costs? In other words, would our organisation need to stop work on other issues to focus on this project?

