Five Really Useful Tools For Project Management in Social Care

By Carolyn Barber

There are a wide range of well established planning tools which can be used to aid the project management process, and provide the means to monitor and review project plans over time.

Here I outline five of the most useful planning tools for projects in health and social care.

1. Plus, Minus and Interesting

Developed by Edward De Bono, this is a simple technique for 'weighing up the pros and cons' of a decision. It involves listing the plus points of a plan in one column, the minus points in a second column, and any interesting points in the third column, these might include any implications or uncertainties you want to take into consideration.

Each point is then allocated a positive or negative score. So for example, if you're a manager deciding whether to set up a new in-house training programme, a plus point of this plan might be 'existing training is not meeting staff needs' and you might give this a score of +4. A minus point might be 'limited resources to commission more or better quality training' and could be given a score of -4. Interesting points might be 'recent complaints from staff about the current training' with a score of +2, or 'it's a big job to take on', given a score of -3.

All the allocated scores are then added up. If the total is on the + side you get the thumbs up to proceed, if its on the - side caution may be advisable.

2. Force Field Analysis

Force Field Analysis is another approach for looking at all the forces for and against a decision, or the pros and cons. Its particular value is that it helps you develop a strategy to support your project. This means you can strengthen those forces supporting a particular course of action, and reduce the impact of the opposing forces.

To use this tool:

1. Describe your plan or proposal for change in the middle of a piece of paper.
2. List all forces for change in a column on the left hand side of the paper, and all forces against change in a column on the right hand side.
3. Assign a score to each force, from 1 (weak) to 5 (strong).

Using the same example described above, a force for change might be 'opportunity to involve staff in review and development of new programme' with a score of 3. A force against change might be 'shortage of staff makes it difficult to set aside time for review' with a score of 5.

Once you have the visual picture of the forces ranged for and against your project, add up the scores to help you decide whether to go ahead. Then you can look at how to alter the balance in your favour and increase the likelihood of success.

There are two choices of action at this stage:

- Reduce the strength of the forces opposing the project, or;
- Increase the forces in favour of the plan.

Often the best solution is the first option; trying to push change through regardless of opposing factors can cause its own problems. People often resist change all the more if they feel its being forced on them.
3. Gantt Charts

Gantt charts are probably the most well known of project management tools and present a clear visual picture of the planning and progress of a project.

First you identify all the tasks which need to be done, activities that must be completed, resources that must be found. A simple example is that of setting up a newsletter. The list of tasks would include:

- Plan overall aims.
- Identify contributors.
- Design layout.
- Find advertising/sponsorship.

Secondly you create a time-line for the estimated length of time the project will take (in this case 12 weeks) and then give each activity a separate line. 'Planning the overall aims' may take two weeks, so the line is drawn to represent this.

You can colour code the time lines as blocks to show the type of activity, or to allocate responsibility to different team members, or to review what's been achieved. And you can show costs in a column at the end of the time line against each activity.

There are limitations however, particularly if a project becomes more complex. Often in practice you can't do one task at a time, or even one after another. Some activities need to happen at the same time or to use the technical term 'in parallel'. Some tasks must be started before others and certain tasks must be completed before others can begin, these are known as 'dependencies'.


4. Critical Path Analysis

This planning tool takes these factors into account to give you a more complex visual picture. Critical Path Analysis is a very logical and effective way of planning and managing projects which involve doing several things at the same time in order to reach the next stage. It shows what needs to be done and when, in a diagrammatical form. You can expand the diagram to reflect the scale of your project and apply timescales and costs to each activity and resource as necessary.

So for example, you need to 'plan the content of the newsletter' before you 'write the news items' (dependency). However a number of different tasks can be done at the same time (in parallel), maybe by different people, before copies are finally printed.

Find out how to create an Activity Network Diagram.

5. PERT (Program Evaluation and Review Technique)

In social care services there is a well established tradition of underestimating the time any change is likely to take. This is particularly true if you’re not familiar with the tasks or the changes to be implemented. People forget to take into account unexpected events, or other things taking priority, or just don't allow for the complexity of implementing change.

For good project management reasons however, estimating time accurately is essential for two main reasons.

First, estimates of what can be achieved within a certain time mean targets or deadlines can be set. To be meaningful these milestones must be as realistic as possible, otherwise people get demoralised. Recognising success and progress is an important part of achieving change, and if milestones haven't been met you need to be able to identify reasons for this.

Second, if you're applying for external funding you need to have sensible timescales. This gives you credibility, but also your planned outcomes are far more likely to be evaluated as successful.

The first stage in estimating time accurately is to fully understand what you need to achieve. This involves a detailed review of the tasks required. Project management tools such as Gantt charts and Critical Path Analysis can really help you break down the different tasks and make your best guess at the time needed for each.

Make sure that within your estimate you allow time for detailed project planning, liaison with other agencies, meetings, quality assurance and any supporting monitoring documentation, which needs to be
put in place.

Also allow time for:

- Other urgent tasks which have to be given priority.
- Accidents and emergencies.
- Internal meetings.
- Holidays and sickness in essential staff.
- Managing existing workload.
- Unexpected delays in access to resources.

These factors may double (or more than double) the length of time needed to complete a project.

**Estimating Time Accurately (PERT)**

PERT is a formula for calculating the time period needed for a project, or each project stage. Essentially it's a variation on Critical Path Analysis that takes a more sceptical view of time estimates.

To use it, estimate:

- The shortest possible time each activity will take.
- The most likely length of time.
- The longest time that might be taken if things go wrong.

The formula looks like this:

\[
\text{Estimated Time} = \frac{\text{Shortest time} + 4 \times \text{likely time} + \text{longest time}}{6}
\]

This helps to bias time estimates away from the unrealistically short time-scales normally assumed. For example, to write a 2 page funding bid for your project, the formula may look like this:

\[
2 \text{ days} + 4 \times 5 \text{ days} + 20 \text{ days} = 42 \text{ days divided by 6 = 7 days.}
\]

**Further Recommended Reading**


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