



The Hubble Project

Project Management Guide

Tech-enabled care projects

March 2021



Project management guide

Project managing the implementation of technology into a care setting can be a complex activity. Each organisation and each project will require a different approach. This brief guide outlines key issues to be considered when managing your tech project. It has been produced as part of [The Hubble Project](#) to support care providers to introduce tech-enabled care.

Project initiation

Producing a Project Initiation Document (PID) can help to ensure all members of the project team, the leadership of the organisation, and suppliers, all have a shared understanding of the project. It should be produced by the project manager in consultation with all team members and suppliers, and signed off by the main project sponsor (i.e. the senior executive or group that the project reports to).

A PID defines the project and forms the basis for its management and the measurement of its overall success.

If you have already presented, and received approval of, a business case, much of that information can be reused in your PID.

A PID should include the following key sections.

Project summary

Provide an 'at a glance' summary of the project purpose, how it supports improvement in care, which departments and technology will be involved and the key activities that will be performed.

Purpose

- Why is the project being undertaken?
- What are the key deliverables?
- What is the planned [ROI](#) (high-level and not necessarily financial)?
- What are the key touch points?

Project objectives

This section identifies the key project objectives – what specifically will this project achieve?. It is likely to include active verbs such as replace, revise, provide, secure, create etc.

Scope and exclusions

Describe the main work streams and products that will be delivered, as well as a brief clarification about what is NOT included in the project.

A workstream is a group of related activities or areas of work within the overall project. It will have a series of products and deliverables, and should have a designated lead for ensuring that workstream is delivered on time to support the wider project. The workstream lead may be a member of staff, consultant or an employee within a supplier.

Workstream	Products/deliverables	Workstream lead
Procurement and contract management	All contracts in place, and monitored on regular basis	Project manager
Communications and engagement (inc launch)	Focus groups, staff briefings, team meetings, senior management meetings, project team meetings, email, intranet, letters, residents and relatives meetings, posters etc	Coms lead
Infrastructure upgrade /development	Secure, 5g wifi system in place in all areas of the home by x date	Inhouse IT lead/facilities manager
Tech development, installation and testing	Agreement on tech spec, production of all tech, and installation. Includes managing any adaptations, integration with existing system, agreeing and meeting acceptance criteria and testing. Testing to include user acceptance testing	Suppliers + in house IT lead
Sign off	Agreeing sign off on all systems – based on agreed acceptance criteria.	Project manager and sponsor
Launch, training and implementation	Roll out to staff, including programme of training and induction. Delivery of all training materials and sessions.	Training lead/project manager
Review and evaluation	Written report to project team and senior project sponsor, including delivery against objectives, take up, and initial impact	Project manager

Project deliverables

Provide a complete list of the deliverables/products the project will produce. This should, for example, include the number of units that a supplier will provide, plus any ongoing support post-delivery (eg will there be a helpline).

Interfaces and dependencies

Note any other groups, projects and organisations that will be involved in the project or will be impacted by the project. Include any dependencies here, for example if the project is dependent on an external product or an external decision. For example, if you are part of a wider care group, will some decisions be made at the senior group level rather than individual service level?

Acceptance criteria

Describe in measurable terms the criteria that you will use to evaluate if the project deliverables are acceptable. This might include conditions that are not related specifically to the products themselves, like delivery by a certain date. They might relate to what your suppliers provide, as well as teams within the organisation.

Monitoring and evaluation

Document how the project will be monitored and evaluated. For example:

- How feedback will be collected on the value of this project by people who use the technology (e.g. staff, service users, family members, care managers etc).

- The monitoring and evaluation methods that you will use to determine that the project has been delivered to specification and has had the intended impact
- The time scales and key dates for collecting the above information
- How, when and to whom the feedback and the monitoring and evaluation findings will be reported.

Project delivery

Initial risk log

List the known risks to the successful delivery of the project. These should be specific to the project and not just a reiteration of common project risks.

Examples of some risks are outlined below.

Risk Description	Likelihood	Impact	Mitigating Actions
Existing infrastructure unable to support new tech	Low	High	IT team is upgrading infrastructure prior to implementation. Systems will be tested
Staff reluctant to use new tech	Med	High	Consultation, training, review and ongoing support programme in place.
Tech fails to deliver on requirements	Med	High	Tech spec clarifies requirements, and regular testing throughout implementation phase identifies concerns.
Timetable is unrealistic and implementation not delivered on time	Low	High	Timetable developed in partnership with suppliers and inhouse teams. Progress reviewed on weekly basis to identify risks, and agree actions.

Project team

Explain roles and responsibilities of the project team, including project reporting lines. Include external suppliers, and any focus groups or advisory groups. Include their decision-making responsibilities for the project.

Key roles are likely to include:

- Project sponsor (senior executive responsible for strategy, approval of project and any major variations)
- Project manager (day to day management, resource management, reporting to sponsor)
- Project coordinator (admin support)
- Technical lead (inhouse – likely to IT or facilities manager)
- Development lead (within suppliers)
- Implementation lead (may be care manager or training lead)
- Engagement and consultation (coms lead or care manager)

Communication and engagement plan

Set out how information about the project will be communicated, and what level of engagement and consultation may be involved. For example, how focus groups or workshops will work, how will the project communicate progress, escalations, readiness plans for go live etc. There may need to be separate plans for internal and external communications.

Consider how introduction of the tech might support the organisation's external reputation to support recruitment, sales and fundraising.

Quality management of the project

Clarify who is responsible for quality management of the project, and of the deliverables.

For the project:

- Responsibility for checking that all procedures have been correctly followed in preparing this PID rests with: [Insert Name] Senior Project Manager.
- Responsibility for checking and signing off this PID and for ensuring it follows the PID guidance rests with: [Insert Name] Program Manager.
- Responsibility for ongoing monitoring and supervision to ensure that ongoing project management complies with the agreed procedures and processes rests with [Insert Name]

For the deliverables:

In this section document what the quality standards, quality assurance process and quality checking are for each project deliverable.

Project milestones

List the project milestones (key points in a project life cycle). They might be target dates that must be met or delivery of important work streams or markers of progress. This section will likely contain a table similar to the one below.

<i>Milestone</i>	<i>Milestone target date</i>
Project Kick off	<i>Day month year</i>
Design phase	<i>Day month year to day month year</i>
Build starts	
Start of User Acceptance Testing	

Resource plan

This section lists the resources - people and equipment, as well as third party costs, that are required for the project. A description of all of the Roles and Responsibilities should be included along with the resources needed, their skill set, when they are needed, how long for and the associated costs.

Ideally you would track actual usage of these resources against the plan so that you can check if the project is going over the time allocation. Line managers may be concerned if this is the case. Having a resource plan that tracks the use of staff time enables you to pre-empt this and negotiate time.

Third party costs should be tracked to ensure delivery against the budget.

Project tolerance and exception process

Document the agreed Project Tolerances (ie what variations you are willing to accept. This may include variations in time, cost, or products). Provide a brief confirmation of the Exception Procedure to be followed if there is a deviation from the approved plan that is forecast to exceed Tolerance.

Project Plan

The Project Initiation Plan contains Key milestones. But you should also produce a more detailed project plan and timeline which you can update.

Simple project plan

A basic project plan grid is shown below. You can use the Status column to report on issues and next steps.

Workstream	Tasks	Products/deliverables	Start date	End date	Lead	Status

Project Timeline (Gantt Chart)

A project timeline or Gantt Chart illustrates a project schedule and show the start and finish dates of the different elements of a project. The benefit of Gantt charts is that they show the 'dependency' between activities i.e. there are some activities that can't be completed until other tasks have been actioned. You can link activities together to form what is known as a 'critical path' which tells you how long the project will take.