

# Project Management Toolkit

*Turning your ideas into reality...*



This toolkit has been developed to help staff navigate the process and to provide details of the templates that require completion.

All documents contained within this pack are available on the Staff Zone of the Trust website <http://www.shropscommunityhealth.nhs.uk/transformation>

Further information and guidance can be obtained from the Business Development Team:

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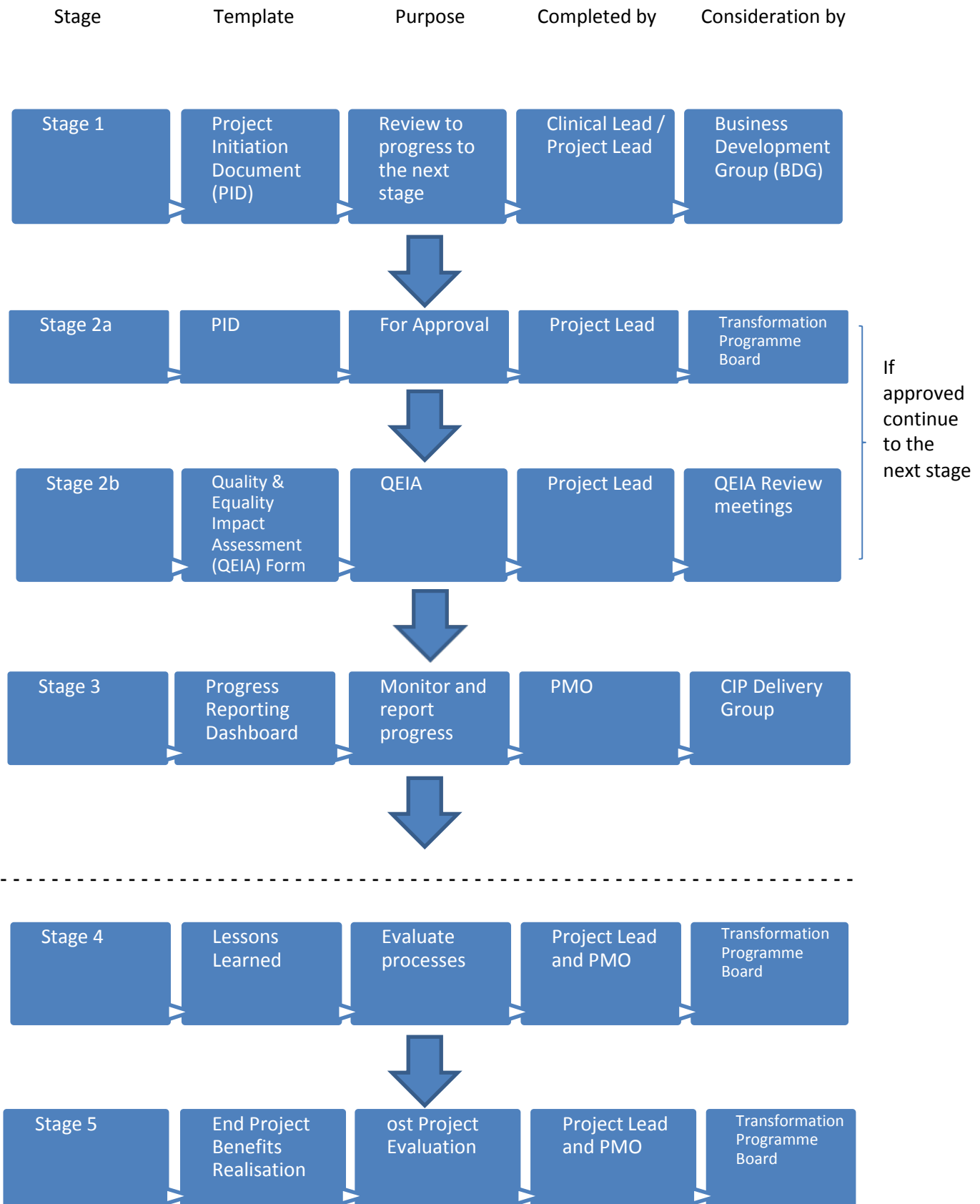
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# PROJECT TOOLKIT



## PROJECT INITIATION DOCUMENT

<b>Project Title</b>		<b>Project Reference No.</b>		<b>Strategic Priority</b>	
<b>Accountable Officers</b>					
<b>Sponsor</b>		<b>Project or Operational Lead</b>		<b>Clinical Lead</b>	
<b>Project Details</b>					
<b>Narrative e.g. Objectives Proposed Change Impact Links to other projects</b>					
<b>Stakeholder / Services Affected by the Change</b>					
<b>Project Team Support and Expert Advisors</b>	<b>Role</b>	<b>Name</b>	<b>Role</b>	<b>Name</b>	
	Project Support		Quality		
	Finance Lead		HR Lead		
	Training / OD		Informatics		
	IT		Communications		
	Estates		Other		
<b>Timescales</b>	<b>Project Start Date</b>		<b>Completion Date</b>		<b>Benefits Realisation Date</b>
<b>Key Benefits</b>	<b>Benefit</b>		<b>Measure (KPI) *</b>		
<b>Key Performance Indicators</b>	<b>Measure (KPI) * as identified above</b>		<b>Target to achieve</b>		<b>Achieve by date</b>
<b>Key Milestones and Timescales</b>	<b>Milestones</b>			<b>Target Date</b>	
	<b>Project Start</b>				
	<i>List of project specific milestones:</i>				
	<b>Project Completion</b>				
	<b>Benefits Realisation</b>				
	<b>Planned Benefits Realisation Review</b>				
<b>Delivery Plans</b>	Is a full Delivery Plan being Developed? Y/N		Where is the Delivery Plan being monitored?		

Quality Equality Impact Assessment (QEIA)																
<b>What is the risk to the quality of services provided?</b>	Safe	High, Medium or Low Risk		Is a QEIA Review Required Y/N *												
	Effective															
	Caring															
	Responsive															
	Well Led															
*If High/Medium Risk to <u>any</u> questions above, a QEIA form must be completed and submitted for a QEIA review																
<b>Date of planned QEIA review</b>																
<b>If a Quality Review is not required briefly state why:</b>																
<b>Where is Quality Impact being monitored?</b>																
Impact on Finance and Workforce																
<b>Monthly Profile</b>  Part Year Effect(PYE) Full Year Effect (FYE)	Income	A	M	J	J	A	S	O	N	D	J	F	M	Total PYE	Total FYE	
	Recurrent															
	Non-Recurent															
	Pay	A	M	J	J	A	S	O	N	D	J	F	M	Total PYE	Total FYE	
	Recurrent															
	Non-Recurent															
	Non Pay	A	M	J	J	A	S	O	N	D	J	F	M	Total PYE	Total FYE	
	Recurrent															
	Non-Recurent															
	Contribution													Total PYE	Total FYE	
	Total															
	WTE	A	M	J	J	A	S	O	N	D	J	F	M	Total PYE	Total FYE	
	Staff Reduction															
	Additional Staff															
	Budget codes affected															
	Capital Investment £															
	Additional narrative															
<b>Key Risks include:</b> Risks to Delivery and Risks to Benefits Realisation  <i>Refer to Trust Risk Scoring Matrix</i>	Risk						Current Risk Score (CxL=)									

## QUALITY & EQUALITY IMPACT ASSESSMENT (QEIA)

<b>Project Title</b>		<b>Project No.</b>	
<b>Completed by:</b> <i>(Clinical Lead &amp; Project Lead)</i>		<b>Date:</b>	
<b>IMPACT ON QUALITY - SAFE</b>			
By safe we mean that people are protected from abuse and avoidable harm			
<b>Risk</b>	<b>Risk Score CxL= (Prior To Mitigation)</b>	<b>Mitigating Action</b>	<b>Risk Score CxL= (After Mitigation)</b>
<b>Quality Measure/Indicator (KPI) (Specific, Measurable, Achievable, Relevant, Timely)</b>	<b>Target</b>	<b>Monitored By/Frequency</b>	
<b>IMPACT ON QUALITY – EFFECTIVE</b>			
By effective we mean that peoples care, treatment and support achieves good outcomes, promotes a good quality of life and is based on the best available evidence			
<b>Risk</b>	<b>Risk Score CxL= (Prior To Mitigation)</b>	<b>Mitigating Action</b>	<b>Risk Score CxL= (After Mitigation)</b>
<b>Quality Measure/Indicator (KPI) (Specific, Measurable, Achievable, Relevant, Timely)</b>	<b>Target</b>	<b>Monitored By/Frequency</b>	
<b>IMPACT ON QUALITY – CARING &amp; RESPONSIVENESS</b>			
By caring, we mean that staff involve and treat people with compassion, kindness, dignity and respect By responsive we mean that services are organised so that they meet people’s needs			
<b>Risk</b>	<b>Risk Score CxL= (Prior To Mitigation)</b>	<b>Mitigating Action</b>	<b>Risk Score CxL= (After Mitigation)</b>
<b>Quality Measure/Indicator (KPI) (Specific, Measurable, Achievable, Relevant, Timely)</b>	<b>Target</b>	<b>Monitored By/Frequency</b>	

<b>Project Title</b>		<b>Project No.</b>	
<b>IMPACT ON QUALITY – WELL LED</b>			
By well led we mean that the leadership, management and governance of the organisation assures the delivery of high quality person centred care, supports learning and innovation and promotes an open and fair culture			
<b>Risk</b>	<b>Risk Score CxL= (Prior To Mitigation)</b>	<b>Mitigating Action</b>	<b>Risk Score CxL= (After Mitigation)</b>
<b>Quality Measure/Indicator (KPI) (Specific, Measurable, Achievable, Relevant, Timely)</b>	<b>Target</b>	<b>Monitored By/Frequency</b>	
<b>EQUALITY IMPACT RISK ASSESSMENT (EIRA)</b>			
<b>Is there potential to cause adverse impact or discriminate against different groups?</b>	<b>Reasons To Support Response to Initial Assessment</b>		
<b>QEIA Review Meeting Date</b>		<b>QEIA Review Meeting Outcome</b>	
<b>QEIA Approval</b>	<b>Role</b>	<b>Name/Signature</b>	<b>Date</b>

## End Project Benefits Realisation

<b>Project Title</b>		<b>Project Reference No.</b>		<b>Strategic Priority</b>	
<b>Accountable Officers</b>					
<b>Sponsor</b>		<b>Project or Operational Lead</b>		<b>Clinical Lead</b>	
<b>Review Completed by</b>		<b>Date</b>		<b>Presented to</b>	
<b>Project Impact Evaluation</b>					
<b>Quality Impact / Realisation</b>	Impact: Positive / Neutral / Negative				
<b>Narrative including Evidence / KPIs where appropriate</b>					
<b>Financial Impact / Realisation</b>	Impact: Positive / Neutral / Negative				
<b>Narrative including Evidence / KPIs where appropriate</b>					
<b>Additional Benefits</b>	Impact: Positive / Neutral / Negative				
<b>Narrative including Evidence / KPIs where appropriate</b>					
<b>Lessons Learned</b>					
<b>What went well and why?</b>					
<b>What could have gone better and why?</b>					
<b>Learning Points and Actions for Future Projects</b>					

**Delivery Plan**

Last updated:                    xx/xx/xxxx

Project Title:

Sponsor:

Project Start Date

Project Lead:

Clinical Lead:

Benefits Realisation Date

Milestones	Measure (kpi)	Action for	2016/17												2017/18					Implementation Risk status	Date Action Completed								
			Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug			Sep							

Implementation Risk Status	
Off track, no remedial actions identified	
Off track, remedial plans identified	
All key milestones achieved	