CANTERBURY RAILWAY SOCIETY INC.
P.O. BOX 13-039, CHRISTCHURCH, NEW ZEALAND.

Operations Group
Society Procedure

Canterbury Railway Society Project Management Processes Policy
CSP-103

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This Document superseded C.R.S. Society Procedure: Nil (This is an original)

Preamble

Project management is the process of controlling a project from the initial bright idea through to producing a completed product. The whole business of project management can be daunting; there is a myriad of books devoted to the subject, software products that help (or hinder) with planning and monitoring of a project, professional qualifications and the like. However, within the CRS we don't have to get carried away; project management can be as light or as heavy as we want or need it to be for a given project.

Definitions

Some basic project management terms:

- **Project -** a planned piece of work that has a particular aim
- **Project Aim –** A definition of what the project is intended to achieve. Aims should be specific and measurable
- **Project Plan –** A written description of a project. The plan will specify the aim of a project, criteria by which to judge when a project is complete, a list of tasks in the order in which they will be performed, people requirements, materials requirements, budget.
- **Task –** A piece of work. A project is made up of several tasks. A task may itself be broken down into sub-tasks. A description of a task will usually contain the same kind of information as that for the project but specific to the task, and an estimate as to how long the task will take to complete.
- **Task Dependency –** Description of which task or tasks need to be completed before a given task can begin. A task can be dependent if only one person can carry out the tasks, or if a task produces something that is needed for subsequent tasks.
- **Critical Path –** is the longest sequence of tasks where each task is dependent on a previous task. Adding up the estimated times for these tasks should give an end date for the project
- **Project Manager (PM) -** the person in overall charge of the planning and execution of a project.
- **Scope Creep –** Adding or expanding project tasks without authorisation. There is always a temptation to do a bit more while we are here; resist at all costs!

When do we Need a Project Plan?

Any project that requires HoD or Exec approval MUST have a project plan prepared and a Project Manager assigned.

Of course, any member may find it beneficial to spend time planning a project whether or not approval is required for it.

Project Manager role

PM Responsibilities

The Project Manager is responsible for the successful completion of a project. It is the PM's responsibility to:

- Put together the project plan in consultation with those who will be carrying out the project
- Prepare a budget for the project

- Present the plan and budget to the HoD for approval (who will in turn seek approval of the Executive)
- Monitor progress of the project
- Act to sort out any issues that may arise in the project
- Control scope creep. If it becomes apparent that more tasks or money are required a revised project plan and budget must be approved by HoD.
- Report progress to the HoD at monthly meeting (or more often if requested by HoD)
- Be the prime point of contact for the project

A project manager need not take any other part in the project. If the PM is also one of the workers on the project care must be taken to separate the two roles!

Project Budget

The Project Manager creates the budget and monitors spending to ensure the project remains within budget.
Any moneys spent must be charged against the Project and the Treasurer made aware of what project the money is being spent on. Spending should come only from the budget approved for the project; petty cash, discretionary moneys etc should not be used to subsidise the project.

Appointing a Project Manager

Within the CRS a project manager will usually be the Head of Department member responsible for the area into which the project falls, however another person may be appointed as project manager if one or more of the following apply:

- A project spans the responsibilities of more than one Head of Department
- There are complexities about the project that require more focus than the HoD member is able to provide
- The HoD member requests it

Any CRS member may be appointed as a project manager for a project who is willing and has the skills.
Generally, the HoD will appoint the Project Manager.

Project Reporting

The Project Manager will report progress on all approved projects under his care each month, regardless of whether any activity has occurred on that project during the month. The Project Manager will report to the HoD General Manager in time for the HoD Monthly Meeting.

For each project the report will contain:
- Tasks completed in the month
- Tasks being worked on
- How the project is tracking according to budget and timeframe
- Any issues
- Any items (such as extra funding needed) which need to be approved by HoD and the Exec

The General Manager will report to the Exec each month with a list of approved projects which includes:
- Project Manager name
- Progress
- Issues and how they will be addressed

- Request for change of scope or additional funding (either of which require a revised project plan).

The Exec may, at its discretion, release a version of the General Manager's Project Report to the Newsletter Editor for publication as part of keeping our members up to date.

Some more about Changes of Scope

In any project it may be found that as the project progresses issues are discovered that mean that the original estimates for the project are no longer correct. The kinds of things that can happen are:

- A task turns out to be more difficult or expensive than expected, for example an item turns out to be in worse condition than originally apparent and will be more difficult to repair, or may need replacing, etc
- It becomes apparent that tasks need to be added to a project. For example, damage is found to extend further than was originally apparent so more items need to be repaired.

When these issues arise the Project manager must rescope and re-cost the project, then seek approval from the HoD to continue with the rescoped project.

Some Heads of Department have a discretionary fund that they may spend within their Departments. The rules around the use of this money are vague but I would suggest that it is intended for purchasing consumables etc. It is NOT to be spent on a project; if the project is going to go over budget, approval to spend more on the project MUST be sought from the HoD.

Scope creep – again – because this is important. Scope creek occurs when a project decides to add extra tasks, or spend more money on tasks, than are necessary to complete the project. The effect of it is to push projects out, or spend money that CRS might prefer to spend elsewhere; and it makes a mess of our planning in general. An example might be if a wagon is brought into the workshop to have its brake rigging redone, then the team decide they might as well fix the buffer beams while they have the wagon in the workshop. Don't do it! – if the buffer beams really need work propose a new project to do it and get it approved (or not).

Related Documents

- Misc. 72. CRS Project Planning Document. This is the document that is used to plan the project, and that must be submitted for approval to HoD and the Executive.
- Misc. 73 CRS Project Executive Report. This is the report that the General Manager will present to the Executive each month.