

Strategic Project Management – Levels and Stages Model

Strategic Priorities

WHY AND WHAT (INITIAL CONVERSATIONS)

1. Identify, clarify, and justify needs and opportunities that are aligned with strategic priorities.
2. Prioritize (assess urgency and impact) and choose a project.
** Consider costs of not addressing an opportunity, or having an attempt fail.**
3. Gather initial information to inform project or initiative planning.
4. What areas of the organization are affected? Who needs to be involved?
5. Establish deliverables and rough timeline (*may include outcomes, goals, objectives, recommendations etc.*).
6. Assign primary responsibility for the project.

Implementation and Innovation

WHO, WHAT, WHEN, WHERE, HOW

1. Define and/or refine outcomes, goals, objectives, strategies, evaluation plan.
2. Standardized project management framework → develop work plans, role descriptions, timelines, budgets etc.
3. Environmental scan or other research/consultation - *consider what similar organizations/projects have already developed that can be used.*
4. Choose strategies, with consideration for new ideas and methods.
5. Plan for risk management.
6. Identify and secure resources needed, leverage available resources and supports (see capacity checklist next page).
7. Collaborate and communicate with internal and external stakeholders - roles, tasks, expectations, progress.
8. Implement strategies according to timeline.

** Consider diversity and inclusion: "nothing about us, without us." **

Evaluation

OUTCOMES AND NEXT STEPS

1. Standardized internal progress and outcome reporting.
Is the project on track? What progress has been made?
2. What changes can be measured and/or observed as a result of the strategies?
3. How have strategic priorities been advanced or impacted?
4. What learning have we gained?
5. How should we share these results, and with whom?
6. What are our next steps?

ASSESSING CAPACITY FOR PROJECTS

- CLARITY:** Are the needs/reasons and goals clearly established and defined? Is there an evaluation plan?

- ROLES AND RESPONSIBILITIES:** Are the roles and responsibilities of team members clearly defined?
 - Does each person have the skills to fulfill their role and responsibilities, or is more training and/or support needed?
 - Is there adequate support and endorsement from leadership/supervisors?
 - Can sufficient time, energy, and enthusiasm be dedicated to the project/tasks?
 - Has consideration been given for engaging others in the organization whose roles are affected?
 - What other resources are needed for the project to be successfully completed?

- ENGAGEMENT OF PARTNERS:** Can leaders/organizers engage and mobilize people as needed?
 - Is there an external stakeholder and partner engagement plan?
 - Is there a communications and reporting plan?

- KNOWLEDGE:** Do people have the knowledge required to fulfill their roles?
 - Ethical knowledge (do no harm)
 - First-hand knowledge (“nothing about us, without us”)
 - Research knowledge (evidence basis)
 - Technical knowledge (technology, law and policy, project protocols, subject specific)
 - Sector knowledge (examples from other organizations, other communities)
 - Knowledge gaps (what is not known)

Supplementary questions regarding assessing capacity for a project:

- Have we ensured that project responsibility is accompanied by necessary skills, resources, time and energy, budget etc.?
- Have we left room for flexibility/change, and learning from errors?
- Have we adequately addressed culture and diversity in the learning dynamic, and in the project itself?
- Have we engaged stakeholders appropriately?
- Is there a role for volunteers, or in-kind support? Can this be properly engaged, managed, and stewarded?
- Have we avoided duplication, or wasted effort? Have we planned to use resources to the best of our ability?

Useful concepts:

Leverage: The ability to influence a system, or an environment, in a way that multiplies the outcome of one's efforts without a corresponding increase in the consumption of resources. In other words, leverage is the advantageous condition of having a relatively small amount of cost yield a relatively high level of returns. (www.businessdictionary.com/definition/leverage.html)