5. Project Management Toolkit: Monitor the Project

Key Question

Once the project is being worked on, the project manager is simultaneously working in two phases of the project: both Work the Project and Monitor the Project. Monitoring the Project addresses the question:

How are we doing?

Embedded within this question are several more discrete questions that help concretize what aspects of the project to monitor. These questions are:

1. Are there any issues or risks to the project that have been identified?
2. Are new goals or work or changes being added to the project?
3. Does the project need to pivot or change course?

Key Activities

Although we call this phase “Monitor the Project”, the project manager should be documenting the answers to the discrete questions listed above. There are several key activities that provide documentation structure to support the project manager in monitoring the progress and likelihood of the project achieving its intended outcomes. These activities include:

1. Draft regularly scheduled status reports

2. Document identified issues and risks in an Issues and Risks Log

3. Document changes to the scope of the project in a Change Request Tracker

Project Status Reports

The phases of a project should work hand in hand. The key activities completed in the Initiate the Project phase and the Plan the Project phase laid the foundation for monitoring the project's progress. The Gantt chart already created identifies the milestones of the project within an overall timeline.

Many projects within legal services will have grant funding that requires regular grant reports that address the status of the project. As a result, many projects have built-in monitoring as a condition of the funding. Grant reporting time necessitates taking a step back from the execution to assess the progress.

Although many project managers may need to take this step because of the funding requirements, it is also helpful to consider whether there are other stakeholders, besides the funder, who would benefit from regular status reports.

For example, status reports are a communications tool that can be used to further partner engagement or even engagement on the project internally at the organization. Although status reports may be similar to grant reports in that they both require taking a step back from execution, assessing the progress, and drafting an analysis, status reports are typically a much simpler and less onerous activity.

Using the Gantt chart as a guide, a project manager can compare what the project has accomplished to date to what was planned in the initial Gantt chart. Summarizing this progress, including highlighting the achievements and key contributions of various team members, constitutes a critical part of the status report. If there has not been as much progress to date as the Gantt chart forecasted, the status report provides space to identify the barriers that contributed to this issue and describe how the project manager is responding to those problems. Finally, the status report should succinctly describe the next steps in the project, which serves to focus stakeholders on the upcoming work ahead.

Here is one example of a Status Report that can be used as a template for your project: Sample Status Report

Issues and Risks

The project manager carries a heavy cognitive load. The key activities throughout the phases of the project help relieve this cognitive burden by creating structures to offload the knowledge and awareness of the project manager. By offloading the many pieces of information about the project into a structured document, the project manager carries a lesser burden of trying to remember every single thought as it relates to the project and can instead open a document that has organized these pieces of information in a meaningful and actionable way.

This is especially true for documenting identified risks and issues since these pieces of information may be especially concerning to not only the success of the project, but also to the project manager.

Risks are potential, unrealized problems that could disrupt the project.

Issues are a risk that has been realized.

Here is an Issues and Risks Log template that can be used in your project: Sample Issues and Risks Log

Managing Scope Creep

Every project will at some point in time face a challenge of scope creep. Scope creep can occur in various ways. Additions to the intended outcomes that were identified in the logic model can increase the scope of the project. Additions to the activities identified in the logic model will also increase the scope of the project. Scope creep occurs when the scope increases without intentionality.

The challenge of an increased scope means that the discrete number of resources in terms of staff time and funding must now be spread over a larger scope of work to complete.

The first step in preventing increases in scope is to identify change requests in the project. This requires awareness of how a request comports with the activities identified in the project’s logic model. Thus, this logic model continues to serve as a foundation for the project until its completion. When there are additional activities requested to be part of the project that were not identified in the logic model, this should trigger documenting this change request for review. This process prevents "creep" from happening because any changes to scope are made with intention.

Here is a Change Request Log template that can be used in your project: Sample Change Request Log

Changing Course

Changing course or pivoting a project is sometimes necessary to address changes in the environment or from knowledge gained during the implementation. Remember, the goal of the project is achieving the intended outcomes. It is possible that the activities need to pivot to reach those outcomes. Watch this video to learn more about how to handle change requests from stakeholders.

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Files

PM Toolkit - Project Status Report Template.docx

Risks and Issues Log.xlsx

Change Request Tracker.xlsx

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