Care Services Efficiency Delivery
Homecare Re-ablement Toolkit

Project Management Guidelines

Four key project management stages

Managing change effectively is critical in helping you to implement, improve or expand your homecare re-ablement service and achieve both your vision and the goals set out in your business case.

Project management is an important discipline in itself with well tried and tested practices and processes. These guidelines take you through a recommended four-stage process for managing a homecare re-ablement project (referred to as “the change project”).

These guidelines focus on implementation and the management of the change project. They assume that you already have:

- Senior management understanding, agreement and support obtained at the outset.
- Defined and documented your vision
- Completed and have approval to a first draft of your business case (you may need to revisit this as you progress through detailed planning)
- Designed your high level customer pathway and identified the optimum position of the homecare re-ablement service.

1. Stage one: project set-up

Set up a project implementation team

A dedicated, multi-disciplinary team is helpful as this creates two-way engagement and ownership of the project from the start. In addition, it will give you the capacity and capability to deliver the project using people who can, for example, facilitate workshops, design process maps, prepare budgets, build contracts etc.

The team is therefore likely to comprise:

- Project manager,
- The service manager,
- ‘Front line’ team members, e.g. occupational therapist, care manager, homecare workers,
- Performance manager,
- Commissioning manager,
- HR manager, etc.
Clarify the project objective

A simple statement should summarise what the objective of the project is i.e., what it is you are going to implement. This should already be contained in your vision and business case.

Confirm the project scope

This identifies what you will do and what you will not do - remember that you are focussing on homecare re-ablement. Scope creep is a common danger in managing large projects and can result in delays and missed objectives.

Identify the project stakeholders

These people have a major interest in the successful implementation and outcome of the project, e.g. senior managers, partners, other internal team members. (Many of these individuals would have been involved in the high level pathway workshop).

Agree stage one project set up with project sponsor

The project sponsor is likely to be the assistant director and/ or the person who signed-off the business case.

2. Stage two: what needs to change? - identifying the ‘as is’ and the ‘to be’

With the vision, business case and high level customer pathway already completed, the direction of the project and objectives of the project are clear and defined. Stage two of the project is to understand what changes are needed in each of the areas highlighted in the implementation pyramid.
This means a detailed comparison between the current service – the ‘as is’ and the future service – the ‘to be’, in respect of:

- Detailed processes
- Team and skills
- Performance management
- Systems and forms

This is sometimes called a ‘gap analysis’. The gap analysis will give you a complete list of the changes to be agreed, categorised by area.

You should also identify any risks and communication issues or specific needs you can anticipate in implementing the changes in each activity area.

3. **Stage three: develop change plans**

Stage three of the project management approach involves drawing up change plans.

**Detailed change plans for each activity area:**

For each activity area (detailed processes, performance management systems, etc) you need to develop an individual project plan with tasks, timescales, milestones and owners. Remember to include communications as a task(s), e.g. updates, reports, team meetings.

**An overall change implementation plan:**

At a high level, this plan reflects the main changes to pathway, process, systems (including technology) and forms.

**People change plan:**

This will need detailed planning to consider structural change, change to numbers, nature of job roles, skills, in-house/outsourcing, etc.

**Communication plan:**

An overarching communication plan will be closely linked to the people change plan and to those directly affected by role and process change. It will also need to factor in a consistent approach and messages to other audiences both ‘internal’ (other social care and health managers/practitioners/staff, etc) and ‘external’ (customers of the service and carers, providers/suppliers, etc). For more information, see [Homecare Re-ablement Communication Planning](#).

**Risk plan:**

Key areas of risk should be identified as it is generally easier to have one risk log which can be tracked rather than have risk embedded in each individual change plan. The risk plan specifies each risk and the action you are planning to take to mitigate it, who will be responsible for taking relevant action and by when.
4. Stage four: monitor and review plans

Over the course of the project, circumstances are likely to evolve; the original assumptions that formed the basis of the initial project plan will need to be adjusted and the project plans updated. Effective project management and delivery must include an ongoing cycle of review and refinement because:

- pragmatic experience of running the project can indicate where further improvements are both possible and desirable
- the project's parameters (political, economic or technical) might change, and the project must reflect this evolution

Regular review is a normal part of every project and it will help to set this expectation right at the outset. This will encourage people to look out for and feedback things that can be done more effectively, as they go along, and reassure everyone that changes to the project are about constant improvement and a willingness to listen and learn from experience.

Example 1

After three months of operating with a new high level pathway, you may find your anticipated discharge routes out of the homecare re-ablement service are not able to move people on as quickly as they are arriving into the service. This is creating a backlog that prevents new referrals from being taken on. You will need to rethink your high level pathway to find a solution.

Example 2

After six months of operating, staff feedback shows that the review forms they are using are too time consuming to complete and collect too much information for the majority of straightforward homecare re-ablement cases. You may need to simplify the form, separating it into two parts, with Part 1 used to gather basic information relevant for most straightforward cases and an additional Part 2 for completion only in more complex cases, as and when they arise.

Example 3

Senior management may need to rethink the fundamental aims of the project and require higher volumes of clients through the service. The vision and business case will need to reflect the new numbers, together with the resource requirements and expected benefits. Without adjusting these figures, it will not be possible to manage service performance effectively.

Conducting a review

The frequency of reviews needs to be agreed between senior management and the project manager. Initially, this might be every three months and subsequently every six months, with the provision for an exception review in extreme circumstances.

A review of a particular element of the project, such as the high level pathway or the business case, may be on a smaller scale than its original development, but many of
the key individuals involved at the start will still need to be consulted, and senior management should still sign off any recommended changes.

The business case and the performance management process are critical tools to use in ongoing review as they act as an early warning system for any problems that the project is encountering. By monitoring and comparing actual performance against the anticipated benefits and targets set out in the business case, discrepancies can help point to areas not working as originally intended and prompt a review and corrective action.