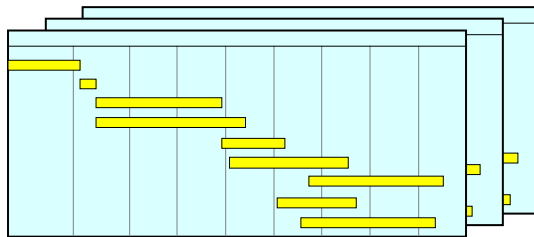


**lindsay
sherwin**

Project Management Training for the Civil Service and Public Sector



Describing the very successful training in project management for policy and organisational projects that we have delivered to the Civil Service Departments and Agencies over the past five years. It describes the training, our clients, case histories, and the consultants/trainers.

Fred Sherwin

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I COMPANY PROFILE

Name: Lindsay Sherwin
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Contact: Fred Sherwin

Lindsay Sherwin specialises in consultancy and training in the Civil Service and Public Sector. It is based in Oxfordshire, was established in 1993, and has worked mainly in the general area of training to support change and development. There are five core members all with extensive experience of the Public Sector and particular areas of expertise. Pen pictures are included in later pages. They are:

- Fred Sherwin BSc. MBA. MSc.
- Margaret Sherwin BA. MSc.
- Chris Eling BSc.
- Paul Goodstadt ACIB FRSA
- Barry Williamson DMS MCIPD MINLP

Clients for our work include:

- Department of Health
- Health Agencies such as Mental Health Act Commission, National Treatment Agency for Substance Misuse, Health Improvement and Prevention Team, Children's Services Team, Eastern Regional Office,
- SCIE (Social Institute for Excellence), Skills for Care (TOPSS), and CSCI.
- MOD at Defence Clothing and Textiles and Defence Aviation Repair Agency
- Department of Culture, Media & Sports - Arts Division
- Office of Science & Technology (DTI) - Science Review Division
- Government Office West Midlands
- Public Record Office
- English Nature, Benefits Agency, Contributions Agency, Crown Prosecution Service, home Office, Immigration Service, Central Office of information, HM Customs & Excise, NPL, Stationery Office, Patent Office.

Our Work

We are quite focussed; specialising in four areas of work, all linked to the Modernising Government agenda.

- Project Management for policy and organisational projects
- Management of Change
- Quality and Customer Service
- Internal Consultancy Skills

II PROJECT MANAGEMENT TRAINING - AN OVERVIEW

Project management approaches were originally developed by military and commercial organisations to bring clarity, structure and discipline to the confusions/misunderstandings that can often arise in project work. Currently, in industries such as oil, construction and aerospace, project management has now become the predominant management style employed.

In recent years, the use of projects as a form of working has escalated as all organisations have developed new ways of working. This has particularly applied to Civil Service policy-making and delivery.

We have been very active over the past few years in developing and providing training workshops to support this in the Civil Service and on the wider Public Sector. Over eight hundred people have attended our workshops, ninety five percent of whom rated the workshops as excellent or very good. According to our clients, the main reasons for this success are:

- Our ability to adapt the training to the clients situation and our knowledge and understanding of the issues involved in government policy-making
- Our practical, "user-friendly" project management approach and the way it has been adapted to reflect Civil Service policy-making.
- A training design that enables people to apply the approaches by working on real projects during the workshops.

Training in project management naturally falls in two areas: the Core training in how to set-up, structure, organise and control projects; and Additional consultancy and training for particular project management skills or issues.

- **Core**
General "foundation" training in project management approaches and techniques. This concentrates upon structuring and planning a project, setting-up and organising projects, and creating a project plan. This is really foundation training for anyone involved in managing or sponsoring projects. Our two-day Project management Workshop, described in the Section III, addresses this.
- **Additional**
In addition to the core workshop, some clients find that their work requires additional skills and we have provided consultancy and training to help. We have provided brief descriptions of our services for these in Section IV

III TWO-DAY PROJECT MANAGEMENT WORKSHOP

This two-day workshop concentrates upon helping delegates to learn how to set-up, structure, plan, and organise projects, and in particular upon carrying out a scoping study and a project scoping plan. It is highly practical, is suitable for all types of projects and links to delegate's work/projects.

The workshop is completely compatible with both PRINCE2 and the OGC framework, but is less bureaucratic. It is also very compact - we cover in two days what other training organisations take three days to cover. The workshops generally follow the following framework:

- **Day 1 Project Management Approaches and Techniques**

Essentially on this first day we cover the project management approaches and techniques. This includes establishing objectives and a project mission, structuring projects into stages, project planning and control techniques, and project organisation. A very full day with a focus on content.

- **Day 2 Scoping and Implementing in Practice**

A complete change of style.

The morning is spent with delegates working in three syndicate groups; scoping, planning and organising a real project selected by the syndicate. This is practice on real work. All the approaches from the first day are used in this. The afternoon focuses on implementation, particularly risk management and decision making. For dedicated teams, we often close by getting the team to focus on the form of organisational groundrules that would help the team manage projects effectively.

The Workshop is suitable for all types of projects and links to delegate's work/projects. Key points are:

- It has been designed deliberately for policy and organisational projects.
- It has a project management backbone with change management features added.
- It is designed for "accidental" project managers who do projects as well as a normal job.
- There is a deliberate focus on the early stages of "setting-up" projects
- It is based around delegates trying and testing the approaches on their own real projects.

Project Management Workshop - Example Programme

Two-day workshop for 8-15 participants

OVERVIEW

The workshop concentrates upon helping delegates to learn how to set-up, structure, plan, and organise projects. It is suitable for all types of projects and links to delegate's work/projects.

AIM:

To provide participants with the key principles, approaches and techniques of Project Management. By the end of the workshop participants should be able to scope and organise a project including: - establishing clear objectives and project mission; define, plan and organise projects; identify and manage project risks and implementation issues.

DAY 1

0930

Introduction

- Group Exercise:
What factors help and hinder the management of projects in your organisation?

1045

Project Management Basics

- Establishing project objectives.
- Structuring (chunking) projects using phases and stages.

1230

Lunch

1330

Project Management Basics continued

- Planning and Controlling the Project
The key project planning and control techniques including critical path analysis, bar charts and milestone plans.
- Project Organisation
Types of organisation for projects and the sponsoring of projects.

1645

Close

DAY 2

0930

Setting up and Scoping a Project

- Setting up and organising a project through a simple project scoping plan.
- Group work developing a Scoping Report for participant's real projects.

1330

Implementing and Leading the Project

- Assessing risk and resolving implementation issues that arise and a Case study on option appraisal and decision making.
- Developing Project Management groundrules for the team

1645

Close.

IV ADDITIONAL CONSULTANCY & TRAINING

When developing a project management capability in depth, organisations have typically made use of five elements, namely:

- Foundation Training - to generate awareness and introduce the skills and approaches.
- Additional Training - in specialist skills e.g. contracts
- In-Work Support - to help people to translate the training into practice e.g. mentoring
- An in-house framework - to ensure that all are "singing to the same hymn sheet", and that people can recognise and learn from "good practice".
- Management Support - so that the use of such approaches are supported and encouraged.

The two-day Project management Workshop provides the foundation training, but some organisations wish for additional training, either in separate workshops or as an extension of the main two-day workshop. Below is a list of some of the key topics.

Additional Training & Support

- **Project Appraisal and Selection**
Covering the key approaches to project appraisal and selection, and the creation of a business case.
- **Contract Management**
Covering such aspects as the tendering process, the key elements of contracts, negotiating skills, vendor selection, and progress control of a live contract.
- **Project Team Leadership**
Where building and motivating a project team is the key issue, training help project managers build their skills and abilities in leadership of projects.
- **Implementing Change Projects**
Training to specifically help those working on change and improvement projects to improve their ability to implement successfully.
- **Programme Management**
Tailored workshops designed to help senior managers to sponsor projects and manage programmes effectively. Covering the programme manager's task, risk management, communications, managing the project portfolio, and managing programme progress.
- **Project Management Surgeries**
Workshops with no fixed programme or content but which take the project and the team as the sole agenda. Particularly suited for complete project teams, when we work on their actual projects.

In-house Project Management Framework

To transfer the training into a real project management capability, many organisations at some stage wish for their own Project Management Framework with readily available guidance or a manual. Using our own simplified generic framework as a basis, we are now working with organisations to help them develop a framework that is tailored to suit their own projects and project working issues, and their own terminology.

V EXPERIENCE AND TRACK RECORD

We had had considerable experience in training in Project Management. We have listed clients with whom we have carried out similar work, and included pen-pictures of a selection of the assignments on the following pages.

Department of Health

Consultancy And Training Support in the introduction of Programme and Project Management in policy-making areas. Large four-year contract still current, involving eighty workshops plus ad hoc support.

Mental Health Act Commission

Project Management workshops for an independent commission responsible for organising inspections and reviews to ensure that the mental health act is being observed.

National Treatment Agency for Substance Misuse

Project Management workshops for a government agency established to support and monitor the effectiveness of drug treatment activities.

SCIE - Social Care Institute for Excellence

Project management Workshops and the development of an in-house framework/manual.

Skills for Care (TOPSS) - strategic workforce development body for social care

Project management Workshops and the development of an in-house framework/manual.

Department of Culture, Media, and Sport

Training in Project Management for policy staff in the Arts Division

DARA - MOD Defence Aviation Repair Agency

Project Management workshops for managers within an MOD operation involving four sites repairing and maintaining the Armed Forces fleet of aircraft and helicopters.

DTI Office of Science & Technology - Science Review Directorate

Project Management workshops for a new unit established to undertake reviews of policy-making in government departments and the scientific evidence basis used.

DfT TRANSEC

Project Management workshops for the Transport Security body within DfT.

Government Office West Midlands

Project Management workshops for managers and staff sponsoring projects within the area.

MOD - Defence Clothing And Textiles - DCTA

Training in Project Management for middle managers

Public Record Office

Training in Project Management and Presentation Skills, Advice and facilitation on Change Management workshop for a directorate, Coaching and Mentoring of managers (Past assignment)

Civil Service College

As Course Director for College training courses in Project Management, Managing Change, and Quality and Customer Service between 1988 and 1993.

Department of Health - Developing Programme and Project Management

Context

Over the past four years, the Department of Health has introduced programme management to implement changes in the Health Service. We were asked to design learning events to support this.

The Task

First we carried out a design stage to assess learning needs through discussions with the key stakeholders. We discussed the needs with DOH Staff Development, held focus groups with expected delegates, spoke to selected managers, and held discussions with DOH ISD who already employed project management.

We then designed a workshop particularly for managers and staff involved in policy work. This led to a workshop design which covered the key approaches and techniques on the first day., leaving the second day available for the course to work in groups using the approaches to "scoping and plan" participants' real live projects

Outcome:

- Over eight hundred Department of Health civil servants have attended the workshops - from junior staff to Senior Civil Service grades.
- The workshops were very highly regarded by the participants. Of the 768 participants, 95% rated the training as excellent or very good on a scale of 1-5. This includes both junior and senior grades.

Summary of Results for DOH Courses Over 4 years	Extremely Well 5	4	3	2	Not at All 1
Overall, how would you rate this training?	298 38%	430 57%	40 5%		

PROJECTS SCOPED

- During these workshops over two hundred projects have been scoped, ranging from defined small projects (a recruitment exercise) to less defined major projects (introducing a new Act). Unsolicited feedback showed that for many of these, the work done on the Workshop had enabled those projects to be progressed far more effectively. As examples:
 - Establishment of a Social Care Institute for Excellence
 - Establishing pilots for commissioning by cancer network
 - Producing guidelines for storage of vaccines.
 - Establishing a new training and assessment organisation for doctors
 - The new Mental Health Act bill,
- There are now numerous cases of the approaches being transferred into daily work and really starting to change the way in which policies are developed and implemented.
- This has been supported not only by the workshop manual but also by a "helpline" we have written available both as a booklet and from the Department's intranet. We have also provided "follow-up" surgeries for individuals' projects.

Sample of the 200 projects scoped and planned during the workshops

Fraud in Welsh optical services	<ul style="list-style-type: none"> to carry out a Counter Fraud investigation into Optical Services in Wales.
NHS Walk in Centres	<ul style="list-style-type: none"> on the next phase of the introduction of NHS Walk in Centres
Survey of Smoking in Restaurants	<ul style="list-style-type: none"> on organising a survey of smoking in restaurant through the regional Anti Smoking Alliance network
Nursing Policy Implementation	<ul style="list-style-type: none"> a project to organise training and development for HAs and Local Authorities to support a Nursing policy initiative
NHS Performance Data Collection	<ul style="list-style-type: none"> a project to organise the next round of performance data to be collected from NHS bodies.
Cessation support for ex smokers	<ul style="list-style-type: none"> organising a pilot on cessation support for ex smokers
MHAC Services Transfer	<ul style="list-style-type: none"> on planning the future transfer of services from MHAC to other bodies.
Delayed Discharge Bill	<ul style="list-style-type: none"> on getting the Delayed Discharge Bill (in COS) through to legislation.
Improving Fostering Services	<ul style="list-style-type: none"> a media campaign for recruitment and training of Foster/Carers
PCT Responsibilities & Procedures	<ul style="list-style-type: none"> one to generate policy and guidance to clarify PCT responsibilities and Acute/PCT procedures following Victoria Climbié inquiry.
Care Direct	<ul style="list-style-type: none"> to organise the next phase of the six CARE DIRECT pilots and transfer to the "Third Age" scheme for older people to be managed by DW&P.
MHAC Visits	<ul style="list-style-type: none"> on planning and organising a set of MHAC visits to High Security Hospitals on issues of particular concern.
Victoria Climbié	<ul style="list-style-type: none"> on organising the response to the impending report on the Victoria Climbié Inquiry.
Commission for Social Care Inspection	<ul style="list-style-type: none"> on the formation of the Commission for Social Care Inspection from the SSI, the Audit Commission Review Team and the NCSC.
Health Diagnosis	<ul style="list-style-type: none"> on a project on developing a National Strategy for Health Diagnosis.
Health Inequalities	<ul style="list-style-type: none"> to produce a delivery plan to reflect cross government activities on tackling health inequalities.
5 a day	<ul style="list-style-type: none"> to provide support to nine London based "5 a day" local projects.
MHRT	<ul style="list-style-type: none"> to centralise the four existing MHRT offices to a London base.
Intermediate care	<ul style="list-style-type: none"> on introducing Intermediate Care for older peoples services
Fostering	<ul style="list-style-type: none"> on developing and introducing national minimum standards for Local Authorities on Private Fostering
Prison Health	<ul style="list-style-type: none"> for an initiative to generate improvements in the provision of Prison Dental Health in the Prison Service.
NHS Performance	<ul style="list-style-type: none"> for the annual provision of statistical analyses of NHS performance for Ministers, DH policy areas, and publication.
Health Smart Card	<ul style="list-style-type: none"> in International Branch on the introduction of a smart card for access to health services in EEC countries to replace the current F111.
Trusts Budgets	<ul style="list-style-type: none"> to develop options and an approach to help a group of Chief Executives for PCTs, Trusts and Mental Health Trusts in an area in Derbyshire to resolve a budget deficit.
Healthy Start	<ul style="list-style-type: none"> to carry out a major update of the Welfare Food Scheme to be replaced by Healthy Start.
Healthcare Industry Taskforce	<ul style="list-style-type: none"> to set up and establish the Healthcare Industry Taskforce.
Vaccine Registration	<ul style="list-style-type: none"> to investigate options for establishing a vaccine batch registration scheme for children's' vaccines.

VI OUR TEAM FOR PROJECT MANAGEMENT TRAINING

Our team for project management training is:

- Fred Sherwin
- Chris Eling
- Margaret Sherwin
- Paul Goodstadt
- Barry Williamson

The team has been carefully chosen our team to take account of the following:

- **Skills and experience as trainers in Project Management**
As you can see from the individual c.v.'s, each trainer has particular areas of expertise but all trainers are adept at training on all topics.
- **Experience as Project Managers**
All of the consultants have practical experience of actually managing projects, either in the Civil Service or private sector or both. The projects span policy, organisational change, and capital/IT.
- **Experience of working with Civil Service organisations and of the Modernising Government agenda**
The Partnership only works in the Civil Service. In addition, all trainers are very used to training civil servants
- **Experience in working with Change Management initiatives**
All consultants have a strong background in this. Fred Sherwin, Chris Eling and Barry Williamson as consultants and Paul Goodstadt from the positions he held at NatWest and Bedfordshire County Council.

Individual profiles of members of the team follow.

IV OUR TEAM FOR PROJECT MANAGEMENT TRAINING**Fred Sherwin BSc. MBA. MSc.**

- A professional consultant and trainer, with extensive experience in managing change, project management, & quality and customer service.
- His early career started with Plessey as a sonar engineer. He then joined the Philips Group, working initially in the U.K. and later internationally in Italy, Ireland, Belgium, and South Africa as a consultant in project management, quality improvement, organisational change, & business development. Then worked in a similar role for Hawker Siddeley.
- Joined the Civil Service College in 1989 and ran courses in Managing Change, Project Management, Quality Improvement, and Customer Service. A pioneer of quality & customer service in the Civil Service.
- He left the Civil Service College to form Lindsay Sherwin. Since then the Partnership has built an extensive client base and a reputation for success.
- Qualifications in Mathematics, Business Management, and Organisational Change.

Chris Eling BSc.

- An experienced consultant and trainer with particular strengths in managing change, team development, and training in appraisal, inter-personal and consultancy skills.
- His early career was with the Philips Group, and then Polygram as Group Training & Staff Development Manager.
- Has had his own practice since 1986. Public sector clients include the Civil Service College, Guys and St Thomas's Hospital. and North Birmingham Community Health Trust. Private sector clients include "blue chip" organisations such as AT&T, Unilever, and Scottish Power.
- With Scottish Power he carried out a major consultancy exercise to support and guide their culture change initiative. He currently works with Unilever on their development programme for their "fast-stream" managers and with the Department of Health providing consultancy and training in the management of "policy" projects.
- He has a B.Sc. degree in Humanities and Technology, is a tutor on the Open University MBA programme (Human Resources) and author of 'The Communicating Manager'.

Margaret Sherwin BA. MSc.

- A psychologist and teacher by background, her particular strengths are coaching and counselling, facilitation, and personal change.
- After graduating in History, she worked first in Personnel and at the Centre for Urban Studies before taking up a career in teaching, working both in the UK and in the Netherlands.
- She then specialised in coaching and counselling for special needs, and established centres at both Maidenhead and at Windsor.
- She now specialises in coaching, research, course design and training needs analysis. She formed Lindsay Sherwin in September 1993, and has recently undertaken research into Health Psychology.
- Has delivered project management training at DOH, Public Record Office, HM Customs & Excise, and MOD.
- Provides a "course design and tendering for contracts" service for a large training organisation
- Has qualifications in History, Education and Psychology.

Paul Goodstadt FRSA ACIB

A consultant and trainer, with particular strengths in consultancy and training for quality and customer service in service industries and local authorities.

His early career was with NatWest Bank, starting in branch management and eventually becoming their national Head of Quality and Customer Service.

He then moved to Bedfordshire County Council to carry out a similar role reporting to the Chief Executive. During that period they won 5 Chartermarks and 5 ISO 9000 accreditations.

He has run his own practice since 1997 specialising in the use of the Business Excellence Model and the management of change and improvement.

He is an Associate of the Chartered Institute of Bankers and a Fellow of the Royal Society of Arts, and a trained assessor for the UK Quality Award and for ISO 9000.

Barry Williamson DMS, MCIPD MINLP

A highly experienced trainer and manager with over 20 years experience in Management and Staff Development.

Career included positions as Head of Management Training for Grand Metropolitan Hotels, British Association for Commercial and Industrial Education, and the Institute of Training and Development, before starting his own Consultancy in 1985.

Extensive experience in the Public Sector - in central government, local authorities, and agencies on management development and training.

Areas of expertise include skills such as leadership, performance management, negotiating skills, change management, and training for trainers.

Has written numerous distance learning packages on such subjects as Selection Interviewing, Leadership, and Harassment.

Qualifications include Diploma in Management Studies, membership of the Chartered Institute of Personal Development, and master practitioner of NLP