



# Project Management Essentials

Pre-reading - 2025





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# WELCOME & INTRODUCTION

- Thank you for taking the time to register for this course!
- This pre-reading aims to introduce all participants to project management at the University of Bath (UoB) and outline key fundamentals to help set the scene prior to the training. The training will provide a brief re-cap of the pre-reading and an opportunity for questions.
- The pre-reading and exercise preparation should take no longer than one hour and additional links included throughout the slides are not mandatory reading but for your interest if you have time.
- **The aim of the training:** to provide an understanding of project management essentials and promote awareness of the UoB approach to project management.
- **The training objectives:**
  - Develop awareness of key project management skills.
  - Understand the UoB project management framework, best practise and how it can be applied.
  - Develop awareness of key tools and templates that are available and how they can be used.
- Before you continue, please take five minutes to watch the Project Management for Non-Project Managers video - by clicking this link - <https://university-of-bath.mindtools.com/a42ifn0/project-management-non-project-managers-video?from=shared-link>



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# Planning, Performance & Strategic Change

## ... at a glance



### Our Mission

Our Mission is to bring together strategy, planning, insights and delivery in an integrated way, optimising our investments and resources, enabling the University to implement our strategy, driving impact and performance.

Develop the Strategy & Performance Management Frameworks  
Provide a coordinated view of strategy, delivery & performance monitoring  
Manage the University planning processes  
Review, improve the input to planning models  
Support the Planning, Delivery & Performance Advisory Board  
Centre of Expertise for strategy development & delivery

Provide leadership and expertise in analysis & insight  
Embed fact-based decision making across the University  
Provide KPI & performance reporting to UEB, Council and Senate  
Support HODs with data & insights for strategy, planning & performance monitoring  
Benchmark performance and produce organisation, competitor, student & macro-environment analysis  
Verify data for statutory reporting  
Centre of Expertise for insight & analytics

Manage the Project & Change Management Framework  
Provide portfolio management, coordination, assuring strategic change  
Manage delivery capacity for strategic projects & programmes  
Develop capability & confidence in change, project & programme management  
Centre of Expertise for change, project, programme & portfolio management



## INTRODUCTION TO THE SPO

- The SPO provides leadership, coordination, support, delivery and best practice for major change initiatives across the institution through effective project, programme, portfolio and change management. We are a Centre of Excellence building resource and capability.
- More can be found out on the SPO webpages by clicking [here](#).
- The Project Management Essentials Training forms part of our aims to support capability development of project and change delivery professionals to achieve understanding, consistency and confidence in project delivery.
- We are here to support you!



# SPO HAS A KEY ROLE IN DELIVERY OF THE UNIVERSITY STRATEGY

## MAKE SURE WE ARE DOING THE RIGHT THINGS...

- By creating environment for **effective decision-making**
- By recommending the order in which the University's **portfolio of projects** should be implemented to ensure strategy is delivered
- By directing the use of our finite **resources** to drive operational effectiveness and reach strategic goals



## ...THAT WE ARE DOING THEM WELL...

- By developing and embedding project and change management **tools, techniques, skills, knowledge**
- By successfully delivering **strategic projects** and realising benefits in line with the University's strategy



## ...AND WITH PEOPLE

- By maturing the **change capabilities** – skills, capacity, knowledge, tools and techniques – and confidence levels within the organisation
- By making sure that change is embedded and that it sticks





## OUR AIMS



***transform*** how we all think about ***projects*** and ***make it easier*** for us to deliver intended ***outcomes*** and ***benefits***. We will be available to ***help*** every step of the way – from understanding the problem to finding and implementing solutions – allowing us to realise the ***University Strategy***



# Our work is underpinned by three key principles



## COLLABORATION

- We bring different teams and strengths together, encouraging diversity of thought and inclusion to foster innovation and great solutions
- We build strong relationships, developing trust and confidence by being part of the solution and demonstrating delivery
- We work collaboratively and in partnership across the University to ensure efficient and effective strategy delivery



## CLARITY

- Our tools and processes are simple, easy to understand, pragmatic and fit for purpose
- We are forward-looking, results-driven and focussed on delivering outcomes and benefits
- Our communication is open and transparent, supporting effective decision making and governance



## CAPABILITY

- We act as a centre of expertise across project and change management, planning, insights and strategy development and delivery
- We balance rigour with pace and flexibility to respond to changing needs
- We use external networks and benchmarking to understand best practice, creating a culture of continuous improvement, peer support and learning from one another



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# WHAT IS A PROJECT AND PROJECT MANAGEMENT?



In simple terms, **Project Management** is the activity of organising, controlling and delivering a **Project**. Although, different *project management methodologies* have their own ways of defining what it means (see grey boxes below).

**Project noun** (c) 'prədʒ.ekt': a piece of planned work or an activity that is finished over a period of time and intended to achieve a particular purpose

## APM Body of Knowledge 7<sup>th</sup> edition

A **project** is a unique, transient endeavour undertaken to bring about change and to achieve planned objectives.

**Project management** is the application of processes, methods, skills, knowledge and experience to achieve specific project objectives according to the project acceptance criteria within agreed parameters. Project management has final deliverables that are constrained to a finite timescale and budget.

A key factor that distinguishes project management from just 'management' is that it has this final deliverable and a finite timespan, unlike management which is an ongoing process. Because of this a project professional needs a wide range of skills; often technical skills, and certainly people management skills and good business awareness.

## PRINCE2 (Axelos)

A **project** is a temporary venture that exists to produce a defined outcome. Each project will have agreed and unique objectives as well as its own project plan, budget, timescale, deliverables and tasks. A project may also involve people from different teams within an organization who are brought together to accomplish a specific goal.

**Project management** can be defined as the discipline of applying specific processes and principles to initiate, plan, execute and manage the way that new initiatives or changes are implemented within an organization. Project management is different to management of business as usual activity, which is an ongoing process, as it involves creating new work packages to achieve agreed ends or goals.



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## WHAT ARE PROJECT LIFE CYCLES?

- A project life cycle includes a series of stages and approval gates that a project follows.
- Think of the life cycle as describing the project journey.
- The key stages often involve getting started on the concept, planning the implementation, and delivering the project. To progress onto each stage, an approval document requires sign-off by appropriate stakeholders.
- More can be found [here](#) on our Project and Change Resource Hub, which is structured to guide you through each stage of the project lifecycle. Clicking on a 'tile' will take you to the guidance, templates and checklist for each stage.
- And this 9 minute video also gives a great overview of the project life cycle  
<https://youtu.be/5DurtA7MXto>

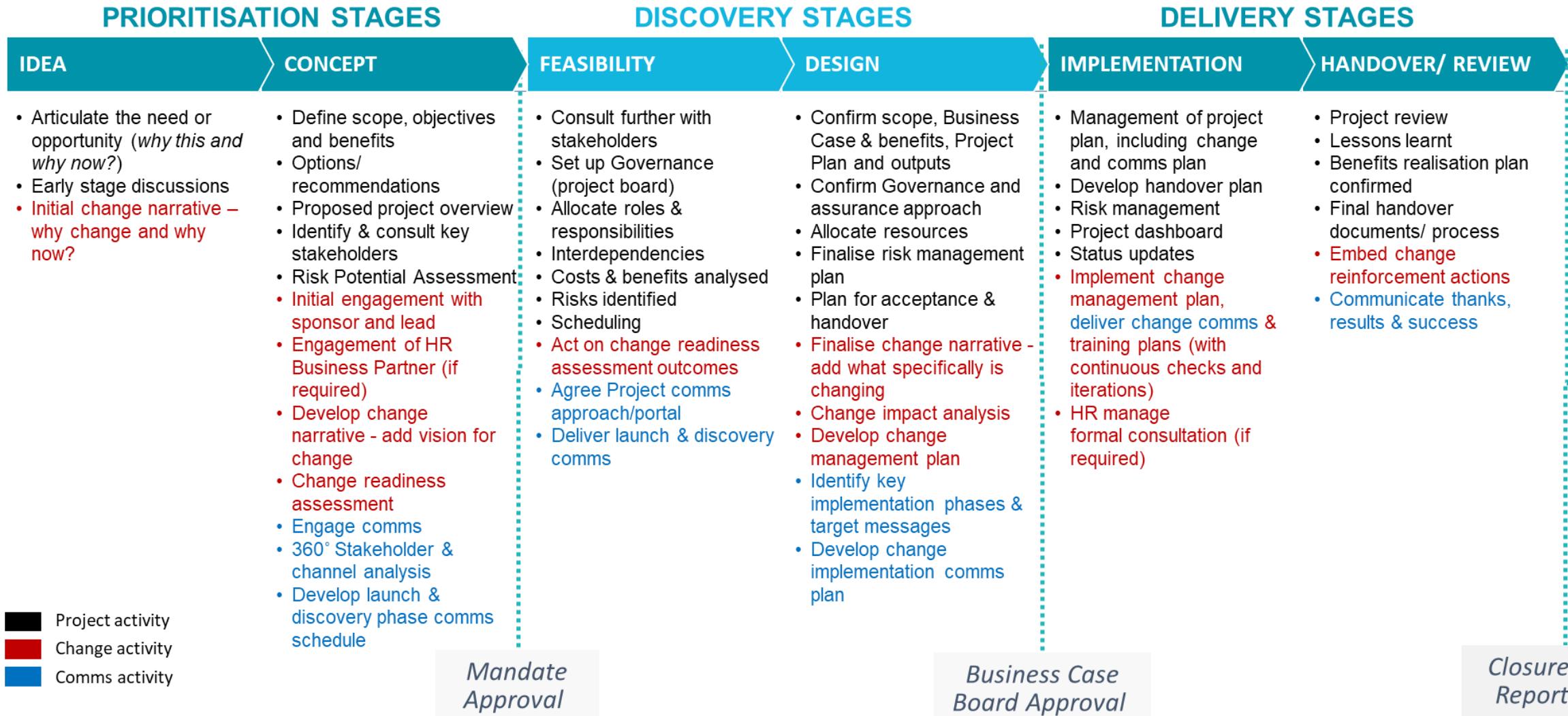


## WHAT IS THE PROJECT MANAGEMENT FRAMEWORK?

- The University of Bath's Project Management Framework (PMF) is a structured set of processes, tools and templates for managing projects in our institution ([accessible here](#)).
- It is based on methods that are considered best practice within the wider project management community and is tailored to be fit-for-purpose in our environment.
- It is intended to empower those who manage projects to do so with confidence, supporting the growing community of project managers at Bath.
- It is designed so that people may adopt as much or as little of the framework as they need to shape and deliver their projects.
- The PMF is owned by the Strategic Projects Office, who are on hand with practical advice and support in applying the framework in your area.
- An overview of the PMF, its stages and key activity is outlined on the next slide.



# UOB Project & Change Management Framework





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## ROLES AND RESPONSIBILITIES

- Many people will play an important role in the success of a project.
- At UoB we recognise three core project roles (Project Manager, Sponsor and Lead) but all three roles may not be required by all projects, it depends on the complexity of your project. More about these roles can be found on the next slide.
- People are key to the delivery of projects. Having the right people involved, with the right approach, skills and time is key to project success. Availability of people should not be the guiding factor.
- A project team needs time to bond and develop working relationships to deliver successfully.
- It's key that everyone understands their roles and responsibilities, is clear how the team will communicate, how decisions are made and what you expect from each other.



# Core Project Roles and Responsibilities



## PROJECT SPONSOR

- Accountable for the project overall, including mandate, business case and realisation of benefits.
- Shares the narrative as the project's key advocate, acting as the voice of the University and providing link to the University's strategic outcomes.



## PROJECT LEAD

- Provides visible and practical leadership for the project including definition of 'business' requirements and approval of key outputs
- Represents those affected by the project and ensures that all stakeholders continue to be engaged constructively, to enable a smooth transition to business-as-usual



## PROJECT MANAGER

- Manages the process (cost, schedule, quality) to ensure that benefits are realised.
- Builds and leads the project team on a day-to-day basis.
- Escalates risks and issues that the project team cannot resolve.



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## EXERCISE PREPARATION - PROJECT IDEA STATEMENT

Prior to the Project Management Essentials Training, using either an upcoming project, live project that is already underway **OR** a fictional project idea (e.g. re-designing your garden, building a house, planning a road-trip/holiday) – briefly complete a **project idea statement**.

A **Project Idea Statement** is produced in the very early stages of a potential project. It contains a brief outline of what the initiative is seeking to achieve and answers the question “**Why this? Why now?**”.

Importantly, it does not need to identify a solution.

- Bullet points will suffice. You should aim to spend about 10 minutes on it.
- Points to consider are listed on the following slide and a blank template is attached as the last slide of this pack.
- During the training we can share and discuss any reflections, thoughts and questions. Hopefully the content of the training will also help address some of the challenges and questions completing this statement might reveal.



# Project Idea Statement

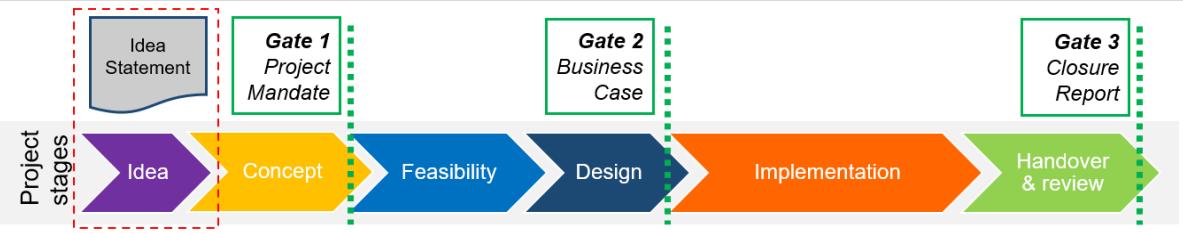


## Guidance – please delete after use

The **Project Idea Statement** (sometimes known as a *problem statement*) is produced in the very early stages of a potential project. It contains a brief outline of what the initiative is seeking to achieve and answers the question “**Why this? Why now?**”.

It does not need to identify a solution, but contains enough information to guide follow up investigation, research and consultations.

It may be used to seek approval to progress with the creation of a formal Project Mandate. In the case of Strategic Projects this decision would be taken by UEB, with a member of UEB as its sponsor.



## Idea or Problem

- What is the problem or opportunity?
- What is the impact, or potential impact? (think about time / money / resources / potential benefits)
- What would be the main objective(s) of the project?

## Approach

- What options are being considered? (mention preferred/recommended option if appropriate)
- What is not in scope? (may also mention dependencies here)
- Who has been consulted so far?

## Next Steps

- What actions are needed to take this forward?
- Who will be the sponsor? And who will lead it? Who else will need to be involved?

## Potential Project Costs & Benefits

What is the approximate Cost of the project:

Small (£0-£50k)  Medium (£50k-£200k)  Large (£200k+)

What types of Benefits might the project deliver:

- Improve Learning & Teaching
- Cost savings/efficiencies
- Increase revenue
- Research impact
- Improve student experience
- Mitigate institutional risk
- Climate Action impact
- ED&I impact
- Improve staff experience
- Regulatory compliance
- Other (describe in text)



# Project Idea Statement

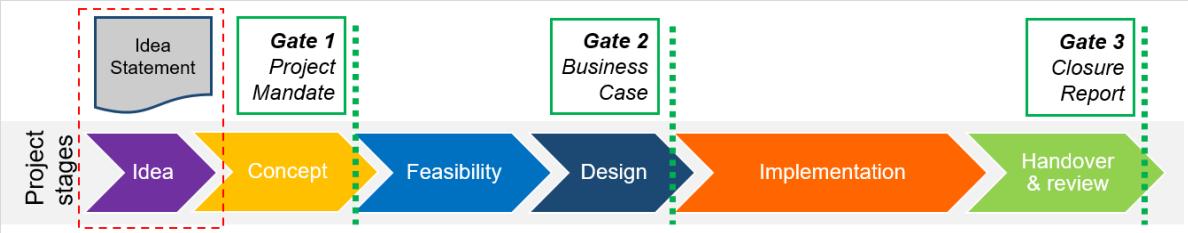


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## Approach

## Next Steps

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