Department of the Environment

Inner Cities Directorate

MANAGING URBAN CHANGE

A Report on the Management Training Needs of Urban Programme Project Managers

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Prepared for The Department of the Environment by
URBED (Urban and Economic Development) Ltd

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Preface

Contents

Summary And Conclusions

1. This report sets out the findings and recommendations of a programme of research into the management training needs of Urban Programme project managers carried out by URBED on behalf of the Department of the Environment. It arose out of the Department's continuing drive to promote good management in Urban Programme projects and to overcome problems identified by previous research. The findings should also apply to the management of similar types of urban change projects.

2. URBED's programme of work included interviews, questionnaires, case studies, regional workshops and action learning sets as well as desk research, and this report is based on contacts with over 700 people involved in the management or support of Urban Programme projects. The research concentrated on voluntary sector and local authority projects, and was almost entirely confined to England.

3. **This report concludes that training and support for project managers is currently insufficient, that there is general agreement that improved management could yield substantial benefits, and that a series of practical steps could be taken to provide the necessary support, building on what already exists at local level. However there is no obvious body to take the lead in implementation.**

4. A great deal of management training is available from a wide variety of providers throughout the country. However project managers in both local authority and voluntary sector projects feel they are not getting the kind of help that they need. In the main, trainers provide courses whereas project managers, particularly inexperienced ones, want information and advice. Urban change projects are often complex and innovative in some form, and the key management skills required are **entrepreneurial skills** (Sections 2.6 and 2.7), which are best learned through experience and on the job training. **Hence the need for practical information and informed advice, especially for inexperienced managers and in the early stages of a project.**

5. Most project managers lack previous management experience and training. However vision, genuine concern and commitment are important attributes for success in managing urban change and project managers need to identify closely with the groups that their projects are serving. Furthermore the Urban Programme makes an important contribution by enabling management functions to be exercised by members of local communities which thus absorb management skills. It is therefore likely and desirable that inexperienced people will continue to come forward to manage urban change projects, and they will need support.

6. Fortunately the management problems which projects typically encounter tend to vary according to the **stage of development** of the project (Section 3.1), and they can often be lessened by **good initial planning** (Section 3.2). Thus training and support can be spread over the life of the project in response to problems which are encountered or anticipated. A great deal of experience and expertise has already been accumulated on tackling urban problems; the vital requirement is for project mangers to have ready access to relevant and informed advice and to know how to use it. Experienced project managers build up **networks of contacts and allies** (Section 5.7); inexperienced managers feel left out in the cold. They need to be helped into relevant networks. Many of the required contact points already exist, either locally (through local development agencies, local authorities, training establishments, companies, etc.) or nationally (through national associations relevant to particular types of projects), but there is no system of ensuring— or even encouraging— the appropriate links to be made.

7. **The main recommendation of the report is that support for project managers should be made more systematic, initially through the designation of at least two suitable contacts — one local generalist and one national specialist — as entry points into networks for information and advice (called the Project Management Support System) (Section 6.1), and through the publication of an updatable Project Management Handbook for project managers and their advisers (Section 3.1). These two steps should go a long way towards filling the training and support gap.**

8. **The second main recommendation is that more effort should be focussed on the initial planning and assessment of projects, using a two-stage selection process to allow resources to be focussed on high priority projects (Section 3.2). Principal funding agencies should be asked to endorse the importance of management training and other expenses vital to the health of a project and to**

ensure that adequate provision is made for them in the budgets of projects they approve (Section 6.3).

9.   Furthermore, much of the training and support required can be brought about quite simply, and other recommendations include:

— the encouragement and facilitation of **visits to other projects** (Section 3.2), and the designation of **Demonstration Projects** (Section 6.4)

— the continued publication of **case studies** and **guides to good practice** (Section 6.4)

— the introduction of **Awareness Days** for all new project managers (Section 6.4)

— steps to ensure that a full range of **basic courses** (including financial management, and the role of the management committee) are available in each area (Section 6.5)

— the encouragement of local authorities to appoint **link officers** and to work in partnership with the voluntary sector (Section 3.5)

— the encouragement of projects **managed by** ethnic minority groups (Section 3.6)

— the establishment of a high prestige, professionally recognised, **post-experience course in project management**, tailored to the needs of local authority officers, but also attractive to others (Section 3.7)

— the exploration of the concepts of **'project franchising'** and **'twinning'**.

A full summary of the conclusions and "recommendations" is given in Chapter 7.

10.   Implementation of these recommendations requires action at local level. Many existing organisations and agencies can make a valuable contribution in their areas, but their efforts will have to be co-ordinated and matched to the needs of projects. And in some cases they, too, will need support. It is not clear who could best take the lead in implementation. It is therefore recommended that a Project Management Support System be organised first in one or two pilot areas, using the government's Local Collaborative Project scheme, in order to demonstrate its value and develop the ground rules to allow its eventual expansion to all areas, thus ensuring that all project managers receive their support that they need to tackle the urgent problems of our cities more effectively.

Chapter 1　Background

1.1　Urban Change

1.1.1　Most people now recognise that **urban change** — the economic, environmental and social changes on the scale required to revive run-down inner cities — will not take place spontaneously. It needs external resources and it needs to be managed.

1.1.2　By **urban change** we mean not only the physical development and environmental improvement projects usually associated with **urban regeneration**, but also **local economic development** and new kinds of initiatives that promote **community well-being** and **community development**. Although reviving inner cities only became a major national issue in the early 1970's, a great deal of effort has since been made to tackle the problems, particularly by local authorities and the voluntary sector, backed up by central government funds.

1.1.3　Initially, however, there was little experience to draw on, and the approach has been largely pragmatic. New initiatives and new organisations have often been found to be necessary, and people with ideas and commitment, but without necessarily any managerial experience, have found themselves in the forefront of urban change. And although by now a great deal of knowledge and experience of good practice has been built up, little attention has yet been paid to ensuring that it reaches others who could directly benefit from it, or to ways of developing people who can be relied on to manage projects successfully.

1.1.4　This report focusses on the management issues which people running Urban Programme projects face and their need for management training, but many of the findings and recommendations should apply to urban change projects in general, as they can be funded in many ways — including, for example, through the Manpower Services Commission (Community Programme and Voluntary Projects Programme), the EEC (Regional Development and Social Funds), the Home Office (Voluntary Sector Unit and Section 11 grants), as well as through the main programmes of local authorities and through private and charitable trusts.

1.1.5　**The Urban Programme (UP)** is central government's principal means of channelling additional resources into run-down urban areas to support change. 57 districts in England currently qualify for assistance

under UP. This totalled £266 million in 1986/87. There are equivalent programmes in Scotland and Wales.

1.1.6　Although the local authorities in each disctrict now prepare, as part of their Inner Area Programme, an annual strategy which sets out overall objectives and priorities, UP actually works by providing money for **specific projects** proposed by local authority and subsequently approved — in England — by the Department of the Environment (DoE). Central government (primarily DoE in England) pays 75% of the grant and the local authority pays the remaining 25%. The aims of UP are set out in published "Ministerial Guidelines" supplemented by more detailed "Guidance Notes" from the DoE. These stress that:

— priority should be given to capital expenditure and to projects which promote economic and environmental regeneration and mobilise community resources

— the length of time that a project can receive UP funding is limited (normally to a maximum of 3 or 4 years)

— innovative and cost-effective solutions to problems should be encouraged

— due priority should be given to projects designed to benefit disadvantaged minorities, such as certain ethnic groups.

At any one time, therefore, UP is in fact made up of a very large number of individual projects (over 12,000 in 1986/87), each of which is new or recently established and tackling a difficult problem, if possible in an innovative way, and in addition may well be funded by more than one source.

1.1.7　A few UP projects are undertaken by private sector firms, but the overwhelming majority are carried out either by local authorities or by voluntary sector organisations, and it is widely recognised that the voluntary sector makes a very important contribution to urban change. For **local authorities** UP is very useful in a time of severe financial constraint, enabling them to undertake economic development initiatives and other projects which are not a high priority for any traditional department but which can nevertheless make a real impact. For the **voluntary sector** UP is a major source of

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funding. In 1986/87 over 3,500 projects received UP support totalling £75 million. The 'voluntary sector' is no longer confined to organisations staffed primarily by unpaid volunteers. It now covers the whole range of non-statutory, non-profit organisations (Sections 2.8 and 2.9) which are increasingly run by paid staff, and it includes a growing number of community-based groups which are not part of the traditional 'philanthropic charity' world. Here a common approach is to try to obtain Manpower Services Commission (MSC) funding to cover staff costs and UP funding for capital and initial running costs.

1.1.8 UP projects are classified as Economic, Environmental, Social or Housing (**Exhibit 1**), but in practice they vary enormously in size, type of activity, target client group and type of organisation (**Exhibit 2**).

1.2 The Training Issue

1.2.1 Training for management of urban change is an important issue because it is now generally accepted that, in any field, good management can have a significant impact on results and that management skills can be learned. The Department of the Environment, which, together with the Welsh and Scottish Offices, provides much of the central government funding for urban change, is keen to promote good project management for several reasons:

— to ensure that projects make a real contribution to urban change

— to ensure that projects provide good value for money

— to overcome problems identified by previous research (e.g. lack of co-ordinated programmes, slippage on capital projects, meeting the real needs of special groups, failure to pass on lessons that have already been learned).

The Department therefore commissioned URBED (Urban and Economic Development) Ltd. in 1986 to carry out a programme of research into the management training needs of project managers in order to "establish how the management of projects funded under the Urban Programme can be improved and existing good practices built on".

1.2.2 Urban change presents difficult management problems in a context that is unfamiliar to, and probably inappropriate for, most trained managers:

— The problems to be tackled are complex and inter-related, and often have a strong social dimension

— There are many different constituencies in the inner cities whose interests have to be balanced, and market mechanisms are not always appropriate for doing this

— The direct involvement of community groups in the development and implementation of their own solutions to their problems is essential if the changes are to become self-sustaining, and enables much needed management skills to be absorbed into the community.

Also, urban change is a national issue and its priority is such that it is likely to require a major input of public funds for the foreseeable future. It is important that this money is well spent. Yet specific management training is seldom required of, or provided for, those undertaking these projects.

1.2.3 In addition, traditional ideas about training have been changing. Training is no longer seen as a once-and-for-all event at the start of a career, but rather as a series of inputs — from various sources and by various means — throughout a lifetime. Attention therefore has to be paid to the **systems** through which training, or rather learning, can take place as well as to the actual **kinds of training provided**. Furthermore, in Britain, management training as a whole has been neglected and this is now a cause for concern. A recent British Institute of Management survey, *The Making of British Managers*, reported that fewer than half of all companies carry out any management training and that UK managers receive on average only about one day's formal training per year, whereas those in leading overseas companies may receive five. It concluded that in Britain there is no widely used or clearly understood method for educating and training managers. If this is so for business, management training for urban change is likely to be in need of even more attention.

1.2.4 With this in mind we use the word **training** in this report in a very wide sense, to cover all the ways in which someone running an urban change project can learn to manage it better, including:

— receiving **information**
— getting **advice**
— using **technical aid**
— attending **courses**
— employing **consultants**
— learning from **experience**.

Thus we use the term 'training' as short-hand for **'management training and support'**.

1.3 Methodology of the Research

1.3.1 In order to unravel the training needs of project managers this report seeks to answer a series of questions:

— What is running an urban change project like and what are the hallmarks of successful project management?

— Do different categories of project need different management skills?

— Would it be better to try to improve project management by selecting more experienced managers to run projects rather than by training inexperienced ones?

Exhibit 1 UP Covers a Diverse Range of Projects

ECONOMIC	ENVIRONMENTAL	SOCIAL	HOUSING
£91.6m (34.4%)	£40.8m (15.3%)	£113.5m (42.7%)	£20.1m (7.6%)

ECONOMIC

Reclamation, site works, environmental improvements in industrial areas 12.4%

Training (mostly with MSC) 7.8%

Support to firms, small grants most for buildings 5.0%

Provision of small units 5.0%

Business promotion and advice, Local Enterprise Agencies 4.2%

ENVIRONMENTAL

Cleaning up non-industrial dereliction, landscaping 12.8%

Road and transport, traffic management, street improvements 2.5%

SOCIAL

Personal social services, community and welfare projects 15.9%

Recreation/Sport/Play/Leisure, sports facilities 14.1%

Health, improving primary and community care 4.6%

Education, including provision for under 5's, ethnic minorities and school/community links 4.4%

Crime prevention, anti-crime and vandalism schemes 2.0%

Information, advice services 1.7%

HOUSING

Housing, management innovations and external improvements 5.3%

Special needs housing, innovative provision for high priority groups 2.3%

Source: Planned Urban Programme Expenditure 1986–87 (Partnership and Programme Authorities, Other Designated Districts and Traditional Urban Programme), Department of the Environment, Inner Cities Directorate

Note: figures have been rounded.

Exhibit 2 Projects Vary Greatly in Size and in the Method of Organisation

LOCAL AUTHORITY PROJECTS

Castlefield Park, Manchester. A museum and tourist complex covering some 190 acres and now visited by nearly half a million people a year. Initiated by Manchester City Council Planning Department, but drawing on many other organisations including volunteer groups.

State Mill, Rochdale. Conversion of a 250,000 sq.ft. former cotton mill into a centre for vocational training now used by over 4,000 people a year. Initiated by Rochdale Metropolitan District Council's Employment Projects Department and now run by a board reporting to the Education, Employment Projects and Development Services Committees.

TechNorth, Leeds. A technology training centre catering mainly for ethnic minorities and incorporating an ITEC (Information Technology Centre) and workspace for small firms. Project included the conversion of a former tram depot and the equipping and establishment of the centre. Originally organised by Leeds City Council's Industrial Development Department with a local management committee. Now run by the Education Department with financial support from MSC and EEC.

VOLUNTARY SECTOR PROJECTS

Community Design Services, Cardiff. A technical aid centre providing a range of free services for voluntary organisations and community groups from landscaping and graphic design to architecture. Run on co-operative lines with 25 staff. Now starting to charge for services.

Windmill Hill City Farm, Bristol. A thriving city farm created out of 4 acres of former scrapyard. Organised by an action group of local residents and now run by an elected management committee in a non-hierarchical way.

Family Linkline, Knowsley. Telephone advice and counselling service, with drop-in facilities, for anyone needing a sympathetic ear in the Liverpool 25 district. Run by a management committee of 16 and staffed solely by volunteers.

— What training is currently available? How is it used and what else is required?

— What actions are needed to fill the gaps and what are the next steps?

1.3.2 The research carried out by URBED consisted of:

— 123 interviews with people involved with UP projects in different ways

— a review of the literature on the management of urban regeneration and of voluntary organisations, including the DoE's own UP Evaluation Studies and its Guidelines Monitoring assessment of a sample of UP projects

— 4 postal and telephone questionnaires

   ● Project Management and Training Needs (118 replies from people involved with different aspects of UP)

   ● Provision of Management Training (48 replies from organisations providing management training)

   ● Use of Management Training (121 replies from people running or overseeing projects)

   ● Provision of Internal Management Training by Local Authorities (55 replies from local authorities)

— 25 Case Studies of UP projects, the majority of which were considered to be well run, but including three projects which had experienced major problems

— 12 Regional Workshops, held in various parts of the country, each to discuss a key management issue in depth

— 2 Action Learning Sets, each made up of project managers from both local authority and voluntary

sector projects and each meeting four times for half a day

— a review of the management training and support currently available for project managers.

Discussions were also held with a sample of leading providers of management training, with personnel selection experts and with a panel of management experts.

1.3.3 In addition, the DoE established a Steering Group which met periodically throughout the project to advise the URBED team. In all 749 people were contacted during the course of the research programme (**Exhibit 3**).

1.4 Organisation of Report

1.4.1 This report first sets out to explain, in **Chapter 2**, what managing an urban change project is really like, based on our interviews, questionnaires, case studies, workshops and action learning sets.

1.4.2 Chapter 3 sets out the stages of development through which typical projects go and identifies the key management tasks at each stage.

1.4.3 Chapter 4 addresses the issue of whether it might not be better to concentrate primarily on selecting experienced project managers, perhaps from the private sector, rather than on training inexperienced ones.

1.4.4 Chapter 5 describes the range of training that is currently available, what forms of training are valued most by project managers and which training needs are

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Exhibit 3 Over 700 People Were Contacted in the Course of the Study

	Personal Contact	*Questionnaire*
Project Managers and Staff		
— Local Authority projects	87	69
— Voluntary Sector projects	164	115
UP Programme Management		
— Local Authority	62	55
— Central Government	40	—
Training Providers	57	103
National or Regional Voluntary Organisations	19	—
Others	13	—
	442	342
Total Number of People Contacted (excluding double counting)		749

Notes: Personal Contact includes: interviews, attendance at workshops and action learning sets.
        Questionnaire means those replying to postal or telephone questionnaires.

not being properly met. **Chapter 6** sets out what should be done to fill the gaps.

1.4.5 **Chapter 7** summarises the findings and sets out recommendations for action and the next steps required for implementation.

1.5 Project Management Handbook

1.5.1 In the course of the research we came across many examples of successful ways of tackling project management problems. Therefore, in addition to drawing conclusions about training in this report, we have produced the draft of a **Project Management Handbook** entitled "Making Projects Happen", which brings together information and suggestions which are specifically intended to help project managers over the hurdles. From our research we are convinced that there is a need for such a handbook.

1.6 Who is this Report for?

1.6.1 This report is intended primarily for those involved in managing urban change, and in particular those who manage the Urban Programme at central, regional and local levels. However it should also be of interest to others who seek to promote better project management, including funding bodies, management training organisations, corporate social responsibility departments and those involved in supporting the voluntary sector. While the research focussed mainly on the Urban Programme, most of the conclusions will also apply to other similar projects and programmes.

1.7 Conclusion

1.7.1 There should by now be sufficient experience of tackling urban change for it to be possible to pass on good management practices. However, the people involved in managing projects usually receive no specific preparation in spite of the complex tasks they will have to cope with. There is therefore a case for providing **training and support** for project managers. This report, based on research carried out by URBED for the DoE, aims to show what kinds of help would be most useful in what circumstances and what needs to be done to fill the gaps in current provision — both in terms of the specific **kinds of training** required and of the **systems** through which they can be provided.

Chapter 2   Managing An Urban Change Project

The management skills and attributes required to run a project will depend on the tasks and problems involved. It is not feasible to train everybody in advance to cope with every eventuality, and it would be prohibitively expensive to try to do so. But it may not be necessary either. In order to draw conclusions about training for the very wide range of possible projects, it is necessary to understand what it is like to run an urban change project, what problems occur in different types of project and what management skills are required. This chapter, based on interviews, case studies, seminars, action learning sets and questionnaires describes what being a project manager is like, and sets out the key attributes and skills which seem to be required for success.

2.1 The Project Manager

2.1.1 The term **project manager** — meaning a person or small group responsible for and directly involved in running a project — is well understood in both local authorities and the voluntary sector, and caused no problems in this research, except that in some cases local authorities merge projects into their normal departmental work. We have tried not to cover such projects in this study as this would have led to an examination of local authority management in general, which was beyond our brief. However we did examine local authority projects which were managed separately and projects that crossed traditional departmental boundaries (Section 3.7).

2.1.2 The exact role of the project manager varied from case to case. Sometimes the project manager was the originator and driving force behind the project. In other cases he or she had joined in later. In some cases real responsibility did not lie with the project manager, but with a strong management committee or individual member. In other cases the term 'project co-ordinator' or something similar was preferred, to emphasise a desire for a collaborative management style. However, there was no real difficulty in identifying the project manager or managers.

2.1.3 The study found that in both the voluntary sector and in local authorities there is a growing band of people who are committed to the ideas of community development and local improvement, and who are

prepared to devote their efforts to making things happen by managing urban change projects. They come from very diverse backgrounds **(Exhibit 4)**. In the voluntary sector they are often without higher education or professional qualifications, and only rarely in either sector do they have any formal management training or experience. Yet it is on them that the future success of important parts of Britain's urban policy will depend and it is their management training needs that this report assesses.

2.2 Scope for Improvement

2.2.1 Our first task was to establish whether there is scope for improvement in the management of projects and where the main problems, if any, lie. Initial interviews with a wide range of people involved in different aspects of UP showed that there is widespread concern, on the one hand, that projects may not be reaching their full potential due to inexperienced management, and, on the other hand, that projects were expected to make a substantial impact on intractable problems with very limited resources and support. Our first postal survey confirmed that there is overwhelming agreement on these points

— Over 90% of respondents thought that there was scope for improved management on both local authority and voluntary sector projects **(Exhibit 5)**

— "Insufficient training or support" was cited most often (65%) as an underlying cause of management problems **(Exhibit 6)**.

2.2.2 In its 1986 "Guidelines Monitoring" exercise covering a sample of 112 projects the DoE recorded that 88% of projects appeared to be well managed and effective. However 51% of projects had experienced major problems at some time during their lives, and further analysis by URBED showed that a great many of these were management problems

— 45% of the voluntary projects and 28% of the local authority projects had encountered significant management problems.

Thus although scope for improvement may be greater in the voluntary sector it is also substantial on local authority projects.

Exhibit 4   Project Managers Come from Very Diverse Backgrounds

Female, white, aged 29

Degree in Social Administration and Statistics. Worked as a researcher and as a youth training officer. Now running a community consultation scheme developing improvements on a large run-down housing estate and setting up a community centre.

Male, black, aged about 45

Born in Guyana. College science degree. Marketing executive with international chemical company. Became involved in the local Afro-Caribbean community and made a career change. Now running a large, successful community and training centre.

Male, black, aged early 30's

No formal qualifications. Police and prison record. Lived in locality all his life. No management experience. Now running huge conversion project and community centre.

Male, white, aged 37

Planning degree and Diploma in Management Studies. Deputy head of Economic Development Unit in a local authority, running several projects. Lived in the area all his life.

Female, asian, aged 32

No formal qualifications. Long experience in community affairs and campaigning. Running Asian Women's Centre and a networking organisation for ethnic minority groups.

Male, white, aged about 45

No formal qualifications. Former builder and local councillor. Now running community centre, managed workspace and leisure centre in a converted factory.

Exhibit 5   Most Projects Have Scope for Improvement in their Management

SCOPE FOR:	Voluntary Sector Projects	Local Authority Projects
Considerable Improvement	59% ⎤	42% ⎤
Some Improvement	40% ⎦ 99%	50% ⎦ 92%
Little Improvement	1% ⎤	4% ⎤
None	0% ⎦ 1%	4% ⎦ 8%

Source: URBED Questionnaire on Training Needs of Urban Programme Project Managers

Full Question: Some reviews of the UP have suggested there is scope for improving the way projects are managed. How much potential do you think there is for such improvement within projects managed by the voluntary sector and local authorities according to your experience?

Exhibit 6 Lack of Training is a Major Cause of Management Problems

UNDERLYING CAUSE:	Major Problem		Quite Often a Problem	Sometimes/Rarely a Problem
Insufficient training or support available	24%	(65%)	41%	35%
Projects not part of a coherent strategy	20%	(56%)	36%	44%
Lack of collaboration between voluntary organisations and local authorities	21%	(54%)	33%	46%
Inexperience of individual project managers	10%	(44%)	34%	56%
Poor project definition/lack of feasibility study	6%	(44%)	38%	56%
Difficulties in communicating with the project's public	10%	(33%)	23%	67%
Inherently difficult tasks involved in projects	6%	(28%)	22%	72%

Source: URBED Questionnaire on Training Needs of Urban Programme Project Managers.

Full Question: It has also been suggested that management difficulties in Urban Programme projects stem from one of the following. How does this correspond with your experience?

2.2.3 Furthermore, during the course of this study we received information from over 700 people who worked on or were in contact with urban change projects. Their experience and comments were by no means identical, but here were several recurrent themes which show that project managers themselves feel that they are frequently under considerable pressure — or right in the firing line.

2.3 In the Firing Line

2.3.1 A very few project managers appeared to have **no problems at all**

— "We run (the project) just like a business really. We are both secondees from different banks and know what it is all about . . . We have a good board that meets monthly. There is a fairly standard agenda and I circulate my report in advance . . . We have no problems . . ."

But the great majority of projects faced problems, and even the case studies which concentrated on well-managed projects showed that, beneath the surface, there were or had been severe problems at one time or another. There were several typical concerns.

2.3.2 **Pressure on Time and Resources.** Project managers found that they had at least two roles, doing the work and managing the project or the organisation. Both were demanding

— "My real work only starts after 5 p.m. That is the only time for work on planning and developing our operations."

— "There have been many occasions on which the administrator and his deputy have worked until after

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midnight after completing a normal day's work on site or in the office."

— "The managers have to cope with such a heavy personal work-load that there is not much time to actually 'manage'. Constant under-resourcing is a real problem."

— "Two or three officers on huge projects do *everything* and are not paid properly for it."

— "How do I decide how much time to give to securing the future of the organisation, to management and to case work? I end up doing all of them and getting exhausted."

2.3.3 Lack of Management Experience.
Project managers often lacked previous experience but found that they were expected by many outsiders to be fully competent

— "The funding arrives and you have to fill posts immediately, and the pressures are enormous. This leads to initial mis-management."

— "In the early days only one member of the committee had college-level education . . . yet we had to conduct a long-lasting battle over charitable status, engage in complex arguments with local councillors and develop a comprehensive funding strategy."

— "Major management problems often arise when inexperienced groups succeed in winning a large grant from a government or private funder."

— "When you take on a community centre, you get hit by every piece of legislation around and you are expected to know how to deal with all these things"

— "There is this big myth that just because you work for the Council you, or somebody above you, knows what needs to be done. A lot of the time this is just not true."

2.3.4 Internal Conflict and Staff Turnover.
Although much of the work of the voluntary sector can be very rewarding, there can also be considerable tensions

— "Anything positive you want to do creates 200 conflicts."

— "I was completely unprepared for the bitterness and obstructiveness that we had among the staff . . . It all became extremely personal and emotional, yet here we all were supposedly helping disadvantaged people."

— "Some individuals have become burnt out and left. Others have developed a zealous "voluntary" ethic which can run counter to the present-day attitudes of paid staff."

— "There is no career structure in voluntary organisations."

2.3.5 Problems between Local Authorities and the Voluntary Sector.
Successful urban change often requires the voluntary and local government sectors to work closely together, but this is not always easy

— "The local authority does not seem to understand our operations and applies rigid rules."

— "There is a major problem in relating voluntary projects to the departmental committee structure. They do not generally fall neatly within our particular categories."

— "In my particular setting, difficulties arise from the conviction that the voluntary sector represents a threat to local authority departments and their work."

— "Each voluntary project should have a monitoring officer, but there aren't enough of the right people. We have, for example, a librarian steering a bookshop project, who knows nothing about the voluntary sector nor running a shop."

— "You make a request [to the local authority] for something in January and it takes nine months to come through."

2.3.6 Local Authority Organisation.
Even though local authorities have well developed structures and decision making procedures these do not always help project managers

—"You must recognise the difficulties in co-ordinating various departments."

— "It is difficult to get things put right quickly, as the project is dependent on other departments with their own priorities."

— "Departmentalism runs through everthing."

— "The distinctive and specialised roles in a local authority create a working structure that thwarts individual initiative."

— "Many projects are so small compared with main programmes that officers see them as very peripheral activity."

2.3.7 Lack of Management Support.
All this adds up to a substantial cry for help

— "We have terrible pressure to deliver the goods within three years, starting from scratch, with no back up."

— "We are months behind. I have staff problems and I don't feel I can burden my management committee. I need a sense of framework. I don't even know if I'm coping, or if things should be more structured."

— "You cannot rely on a management committee for management."

— "We are running just to keep still."

— "Local government thrives on professional status. I have little confidence from my colleagues as I haven't any qualifications."

— "I don't get any support."

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2.3.8 These are not just isolated comments, and indeed the list could have been very much longer, but these are issues that came up most strongly in our interviews, our main postal survey and in the comments of project managers themselves in the regional workshops and action learning sets and in the case studies. They lead to the conclusion that there is a widespread desire for **management support** — not just for "more money" nor indeed for "more management courses", but for support to help tackle the problems of managing a project.

2.3.9 Project managers are clearly asking for a more supportive climate in which to operate. They feel they are tackling important problems with few resources and little recognition or help. This seems very similar to the situation that people running small businesses faced only a decade ago. (In 1976 Graham Bannock in *The Smaller Business in Britain and Germany* still noted the continuing decline of small firms and "a more favourable environment for small business in Germany"). Since then, there has been a remarkable change of attitudes towards new and small businesses, not least in the inner cities, which has led to much practical support from many quarters. As Exhibits 5 and 6 show, few people concerned with the management of urban change are satisfied with the present situation, and while the need for support may be more forcefully expressed by the voluntary sector the same message comes from the local authorities, for in the management of urban change they are faced with fundamentally similar challenges.

2.4 Impact of Good Management

2.4.1 Good projects depend, almost by definition, on good management. Although very few UP projects openly fail, there is not the same direct correlation between poor performance and failure, as there is for example in business. And while the DoE's annual "Guidelines Monitoring" of a sample of projects show that most achieve more or less what they set out to do, it is only recently through the Urban Programme Management initiative (UPM), introduced in 1985, that new projects have been required to state their objectives clearly and make specific forecasts of their outputs.

2.4.2 However, assessing the impact of management on the performance of urban change projects is extremely difficult. In part this is due to the problems involved in measuring performance. Not only can the real result of a project be difficult to gauge

> — "One problem we now have is with empty converted buildings, where the projects themselves were well carried out but the groups that were meant to be using the buildings have subsequently collapsed."

But also it is the combined effect of a whole programme or strategy on an area which has ultimately to be judged, rather than individual projects. In addition,

management itself is intangible. It is a kind of black box which links inputs to outputs, undoubtedly there but difficult to measure directly.

2.4.3 In business a huge amount of writing and research has focussed on the nature and importance of management, and has tried to establish what types of management style or approach work best in different circumstances. Not only can marked differences in performance be attributed to differences in management (because everything else was the same) but even good management can be shown to be able to improve its performance along an 'experience curve'.

2.4.4 From a management point of view an urban change project is in some respects more complex than a business. Fundamentally a business has to concentrate on satisfying the needs of its customers profitably. The customers are the ultimate source of all the business's funds, and there is very direct financial feedback from them which determines whether the business succeeds or fails. An urban change project, however, has to satisfy not only the needs of its client groups but also the interests of its funders who are entirely separate. As other research, such as the SAUS report *The Urban Programme And The Young Unemployed* has also pointed out, a single project may well have more than one funder, and different funders have different interests and priorities which can easily change. Multiple funding is likely to become even more of a fact of life for voluntary sector urban change projects, especially after their initial period of UP funding has expired. Thus the project manager may have a whole range of interests to identify and satisfy. Futhermore, in a business, established customers tend to provide continuity, whereas project funding is often short term and may suddenly disappear altogether. This not only compounds the problems of management, but makes project managers and staff alike feel insecure, which adds further difficulties.

2.4.5 Thus, while there may not be the same immediate indication of success or failure, good management is likely to be every bit as important for an urban change project as it is for business. Not only do the right projects have to be developed and approved, but also good performance requires both effectiveness (how far the project goals are achieved) and efficiency (how well resources are used). Good management can make a real impact on all of these.

2.5 Case Studies

2.5.1 In order to assess the impact of good management on performance we undertook 25 case studies of projects that had received UP funding. The studies were chosen, in consultation with the Steering Group, to reflect a cross-section in terms of types of project, types of organisation and geographical location (**Exhibit 7**). Most were projects that were generally thought to be

Exhibit 7 List of Case Studies

LOCAL AUTHORITY PROJECTS	Location	Type
Barnsley Enterprise Centre	Barnsley	Economic
Castlefield Park	Manchester	Econ/Env/Social
Lace Market	Nottingham	Econ/Environmental
Rolfe Street Enterprise Workshops	Sandwell	Economic
Sowerby Bridge Riverside	Calderdale	Econ/Env/Social
State Mill	Rochdale	Economic
TechNorth	Leeds	Economic
Women's Technology Training Workshop	Sheffield	Economic

VOLUNTARY SECTOR PROJECTS		
Architecture Workshop	Newcastle	Environmental
Brunel Exhibition Project	London	Social
Community Design Service	Cardiff	Environmental
Family Linkline	Knowsley	Social
Feltham Community Association	London	Social/Economic
Freeform Arts Trust	London	Environmental
Groundwork Trust	St. Helens	Environmental
Hammersmith & Fulham Business Resources	London	Economic
Handsworth Employment Scheme	Birmingham	Economic
Hoxton Trust	London	Environmental
Loris Road Community Garden	London	Environmental
Pallion Residents' Enterprises	Sunderland	Economic/Social
Project Fullemploy	Bristol	Economic
S A D A C C A	Sheffield	Economic/Social
Telegraph Textiles	London	Economic
Thurnscoe Neighbourhood Development Unit	Barnsley	Social/Housing
Windmill Hill City Farm	Bristol	Env/Economic

successful — in terms of survival, reputation and the achievement of results — but some which were known to have suffered major problems were also included.

2.5.2 In each case we visited the project and talked to people who had been involved both directly and indirectly. We also consulted articles and reports where possible and we checked our findings with the projects to correct any factual errors. We analysed each project in terms of how it had evolved, what management problems had been encountered and what management training and support had been useful.

2.5.3 General conclusions which could be drawn from the case studies were:

— Projects do seem to go through a progression of stages of development (or life cycle) with different management issues being dominant at each stage. This was also confirmed by our first questionnaire (Section 3.1)

— Virtually all projects, even successful ones, face major problems at some stage. It is the ability to cope with them that is crucial

— Certain abilities and attributes of the mangement team (which besides the project manager could include members of a management committee and key staff) seem particularly important for successful project management

— Even successful projects receive surprisingly little formal support and training, but many project managers have developed their own support mechanisms

— Local authorities and voluntary organisations have different strengths and weaknesses and different cultures with different implications for training.

2.5.4 In order to draw out the implications for training and support it is necessary to look more closely at the attributes for successful project management, the differences between local authority and voluntary sector projects and, in the next chapter, at the main issues encountered at each stage of development.

2.6 Successful Project Management

2.6.1 While good project design and adequate resourcing are obviously important to the success of any project, we noted certain personal attributes and management abilities that many of the successful projects shared. What is more these same attributes and abilities were common to both local authority and

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voluntary sector projects, even though there were other important differences as discussed below.

2.6.2 The three personal attributes were:

— **concern** with the aims of the project and with the needs of the groups it is trying to benefit. For example,

- The Pallion project was driven by a deep concern for the long term future of a local community in decline, which led to the conversion of a disused factory into a community centre and workshop units
- The manager of SADACCA (The Sheffield And District Afro-Caribbean Community Association) gave up a successful career in the private sector in order to devote himself full-time to the local Afro-Caribbean community.

— **vision** to see what needs to be done and to convince others. For example,

- The founders of Windmill Hill City Farm saw that a rubbish tip could be turned into an urban farm which could become a real community resource.

— **persistence** to see the project through until it becomes sustainable. For example,

- The same team in Nottingham City Council has been responsible for the regeneration of the Lace Market area for the past fifteen years.

2.6.3 It was noticeable that while in UP terms a project might be regarded as being short-term, with specific results to be obtained in a finite period of time, most of the project managers saw their projects in a very different light. There were long term problems to be solved and the project would try to keep going until the needs of the client group were being met in a sustainable way. The key management abilities which the project managers displayed were those that related to mobilising limited resources, to building confidence both internally and externally and to solving problems on the run. The important abilities seemed to be:

— **ability to communicate and negotiate**, especially so as to obtain finance or other resources from different sources. For example,

- Lead officers on the State Mill project took great care to prepare the case for EEC funding, even visiting Brussels to ensure that they understood the EEC's objectives
- Community Design Services produced an inexpensive but attractive card that turned into a pencil holder to stand on people's desks and act as a constant reminder of their services.

— **ability to plan and readjust priorities.** For example,

- The aim of Castlefield Park was to bring a whole area back to life. It was planned in such a way that a museum complex would attract people in, which in turn would attract in private investment
- When Groundwork St. Helens' initial funding was coming to an end they re-examined their strengths and redefined their services.

— **ability to motivate and coach others.** For example,

- On the Lace Market project care was taken to see that all departments received equal credit, which kept up a positive atmosphere
- On the Handsworth Employment Scheme the growth rate of the project was controlled to match the rate of development of local managers rather than relying on outsiders.

— **ability to build networks** to get information and advice. For example,

- The TechNorth project succeeded because of networks of support both among officers and members of the Council and within the local black community
- Groundwork St. Helens formed part of a network of Groundwork Trusts which deliberately transferred experience between each other.

2.6.4 These abilities are not the subjects that are usually covered in simple management text books. However, they do involve skills which can be learned and therefore improved by training, although not necessarily by the conventional methods.

2.6.5 Taken together they are the skills needed to get things done in an uncertain climate. They are not so much the characteristics of what is usually called **project management**, which is derived from the engineering and construction industries and is primarily concerned with scheduling and co-ordination. Nor are they chiefly about project administration, but are far more like the skills needed to set up and run a small business and for this reason we refer to them as **entrepreneurial management skills**.

2.7 Entrepreneurial Management vs. Project Management

2.7.1 The essence of entrepreneurial management is taking responsibility for bringing about successful change or innovation in an uncertain world. The overall objective may be clear but the exact steps required to achieve it are not. It is up to the entrepreneur to find a way through the uncertainties without running out of resources. Although this concept is usually applied to businessmen, and often aggressive ones at that, it is in fact just as relevant to the management of change in other fields. However, the definition of success will be very different. In business, success necessarily implies making profit. In other fields it implies ensuring that the change is both useful and sustainable.

2.7.2 Project management is a different concept (**Exhibit 8**). It is a specialised term used to describe the co-ordination of large scale, one-off capital projects (such as the design, construction and commissioning of an oil refinery or the computerisation of a large organisation's accounting and information systems). Here the activities of different specialist departments and subcontractors have to be planned and scheduled — and frequently replanned and rescheduled — in order to complete the project on time, within budget and to a given technical specification.

2.7.3 There are a number of sophisticated management techniques associated with project management, such as Critical Path Analysis, which can be learned. But it is important to realise that the type of projects to which they might be applied are far removed from the urban change projects covered by this report. Urban change projects are not fundamentally about engineering and construction, but about involving and improving the lives of those who live in the inner cities. It is the ability to organise and bring about beneficial change that is vital. Where building construction or renovation is part of an urban change project it is only as a means to a larger end, and supervision of that part of the project can and usually should be delegated to an appropriate professional such as an architect or surveyor, who will already be trained in the required techniques. The role of the project manager is to manage urban change and this requires entrepreneurial management skills.

2.7.4 Even on local authority projects where co-ordination between departments is crucial, these negotiating, networking and motivating skills are also required. In the case studies we found that local authority project managers needed to be entrepreneurial managers too. This conclusion — that the same fundamental approach is required in both sectors — runs counter to what many of the people we initially interviewed thought, because there are also very marked differences between local authorities and voluntary organisations, and it is important to understand the differences as well as the similarities, because they may affect the type of training required, or how it should be delivered.

2.8 Local Authority vs. Voluntary Sector Projects

2.8.1 Most people we interviewed were in no doubt that there were basic differences between local authority projects and voluntary sector ones, but these really stem from differences in structure and culture. The tasks which projects from both sectors undertake can be remarkably similar; they are both primarily concerned with meeting needs which at the time are not adequately satisfied through the market place; they are both very much concerned with the problems of urban areas and the people who live in them. Indeed, the same kind of service can sometimes be provided by either sector (for example, giving advice to those with special needs). Because voluntary organisations are smaller and more flexible it is often easier for them to innovate or respond to new needs, and through them members of the community can often become involved in solving their own problems. Nevertheless there are plenty of examples of voluntary organisations which have become stuck in their ways, and of local authorities that behave in entrepreneurial and farsighted ways. Furthermore a

Exhibit 8 Projects Management and Entrepreneurial Management are Typically Very Different

	Project Management	*Entrepreneurial Management*
Objectives	To complete a specified project on target	To bring about sustainable change
Operating Environment	Highly complex but well understood	Uncertain
Management Emphasis	Co-ordination and detailed control Internal efficiency	Recognising and taking opportunities External effectiveness
Personal Attributes	Expertise Professionalism Diplomacy Persistence	Vision Concern Enthusiasm Persistence
Management Techniques	Planning Scheduling Budgeting Communicating	Setting targets Assessing progress Making trade-offs Motivating
Examples	Construction project Computer installation	Starting a business Managing change

local authority has the option of setting a project up with its own, virtually independent, organisation rather than running it through the normal departmental structure. These organisations, which we call **Special Purpose Organisations**, can be very similar to voluntary organisations.

2.8.2 However the differences between the two sectors are substantial:

— Local authorities are governed by statutes whereas voluntary organisations can adopt whatever constitution they choose. The amount of regulation governing local authorities inevitably influences attitudes, and makes people behave more bureaucratically to avoid making mistakes or acting illegally. In contrast voluntary organisations can act with greater freedom, provided they can find appropriate funding.

— Local authorities have a greater degree of security because their basic costs are covered from sources like rates and government grants, whereas voluntary organisations often feel as if they are always on the 'edge of a precipice', because much of their funding is short term.

— Local government officers report to committees made up of elected councillors, and must therefore be sensitive to political compromises and decisions. Most voluntary organisations are responsible to management committees whose members often have a direct interest in the needs the organisation is aiming to serve, and may have originated the idea, but who may not have any management experience themselves.

— Because of its size and uniformity people can make a career in local government, whereas the voluntary sector is made up of many small and separate organisations in which jobs are for a limited duration and offer few prospects of advancement. Typically, local government officers have to move from one authority to another in order to develop their careers and thus may not build up such strong relations with the local community.

— The key positions in local authorities are held by people who are members of well-defined professions, where qualification depends upon a combination of education and experience. Voluntary organisations, especially community groups, are usually run by people whose main qualifications are idealism and commitment to the particular aims of their organisation.

— Voluntary organisations are dominated by the so-called "voluntary ethos", that is the staff are not supposed to be there for the money or for a career, but because they genuinely care about a particular set of needs. In the past much of the work in voluntary organisations was indeed done by people who were unpaid. This is no longer the case, and many now have paid staff, although management committee members are still unpaid.

— Different local authority departments and professions tend to have their own priorities and practices, which can lead to departmental rivalries, but they also have formal mechanisms for dealing with conflict. In contrast, conflicts within voluntary organisations are often personal and mechanisms for dealing with them may not have been established.

— The type of training which local authority officers value most is that which is professionally recognised and will help to develop their careers. Voluntary sector project managers are more concerned with support that is relevant to their immediate needs and particular situation.

2.8.3 Thus, in spite of the similarities, the differences also have major implications for the types of training that will be effective in each case. Furthermore, neither local authorities nor voluntary organisations form homogeneous sectors and it is useful to note some sub-categories (**Exhibit 9**).

2.8.4 This study was not concerned with the management problems of purely **departmental projects** of local authorities, but several **Special Purpose Organisations** were included in the case studies which confirmed that their initial management problems were rather like those of a voluntary project with a powerful but slow moving management committee. Success depended upon the project manager having the opportunity and determination to innovate and act entrepreneurially during the early stages, but once the project was well established the 'management committee' gradually exerted its authority, making the project conform more and more to local authority methods and approach. In several cases the original project manager then left, but by that time he or she had performed the role that the local authority had wanted and could probably not have achieved itself.

2.8.5 **Multi-departmental projects**, which are really the core of successful urban change, did seem to present special difficulties for local authorities. The traditional departments and professions are powerful, and they are mostly concerned with providing services or with regulations. There is as yet no profession of urban change, or even local economic development (although moves towards this are under way with the establishment of the Institute of Economic Development Officers). In this respect local authorities are somewhat like large companies were when they were organised on a functional or departmental basis, before the introduction of 'profit centres' or 'business units', and it is in such circumstances that the concepts of classical project management might also be relevant, as well as those of entrepreneurial management. We therefore looked specially at the management problems of multi- departmental projects (Section 3.7).

Exhibit 9 Projects may be run by Different Types of Organisation

LOCAL AUTHORITY PROJECTS

Departmental Projects

Projects which fall entirely within one department's normal activities
e.g. Education projects, traffic management schemes

Multi-departmental Projects

Projects which require substantial participation by more than one
department, such as area regeneration projects
e.g. Castlefield Park (Manchester)

Special Purpose Organisations

Projects set up and overseen by the local authority, but whose staff are
employed specifically for that project and are seen as separate from
normal departmental staff
e.g. State Mill (Rochdale), Hammersmith & Fulham Business
Resources

VOLUNTARY SECTOR PROJECTS

Voluntary Agencies

Service providers for particular groups; often long established and
initially motivated by philanthropy
e.g. NACRO (National Association for the Care and Resettlement of
Offenders)

Community Groups

Social change organisations; often established with the aim of meeting
a local need
e.g. SADACCA (Sheffield and District Afro-Caribbean Community
Association)

Local Development Agencies

Specialist bodies providing technical and other aid to other voluntary
groups or to the public
e.g. Councils for Voluntary Service, Action Resource Centre

Community Businesses

Voluntary organisations that support themselves wholly or partially by
selling their output
e.g. Windmill Hill City Farm (Bristol),LCVS Enterprises Ltd.(Leeds)

2.9 Voluntary Organisations

2.9.1 A few voluntary organisations, including the established **voluntary agencies**, have found stable niches and built up their own particular identities, ways of working and sources of finance. They, too, may have become large enough to have developed internal career paths, through which people can gain project management experience as they are promoted. Their own internal training is also well developed, and we concluded that their needs for new training initiatives were far less than those of small voluntary organisations.

2.9.2 However, the great majority of voluntary organisations are small and in an unstable situation. This is especially true of **community groups** and **community businesses**, as well as some development trusts and resource centres. Urban Programme, or other funding, has given them a temporary breathing space but they have an over-riding need to achieve sustainability, just like a small business has. Thus their need for entrepreneurial management skills is paramount, and in the next chapter we shall look particularly at the problems they face and when these are most likely to occur.

2.10 Conclusion

There is a substantial cry for help from those running projects, because they face so many different problems and feel they receive little support. There are clear differences between local authority projects, which have a structure to rely on, and voluntary sector projects, which are in a situation of permanent instability, and these differences have an important impact on the type of training that is appropriate. However, because most urban change projects involve doing something innovative or unfamiliar, the management attributes required are more like those of starting and running a small business than those of administering an engineering or construction project, from which classical project management is derived. We have therefore used the term **entrepreneurial management** to describe the approach required, and the case studies show that it is as important in local authority projects as in voluntary sector projects.

Chapter 3   Locating The Problems

If urban change projects require an entrepreneurial management approach they may also share some of the other management characteristics of small businesses. In particular it might be possible to separate out over time the different tasks which project managers are likely to face and for which they might need training. If this were so, it should be possible to provide relevant training and support as a project progresses rather than comprehensive training at the very start, and this would be a big advantage. This chapter therefore looks at the different stages of development of a project and identifies the key management tasks at each stage. The specific problems faced by ethnic minority projects and by multi-departmental projects are also examined.

3.1 Stages of Development

3.1.1 In business there is a well established concept called the **product life cycle** which implies that each product which a company makes goes through a succession of different stages and that the management issues faced at each stage are different. These stages occur in sequence, but the time taken in each stage can vary enormously. It is important to know at which stage each product, or business is, in order to manage it properly. These stages are usually described in management text books as **Planning, Start-up, Growth, Maturity** and **Decline**.

3.1.2 Our first questionnaire asked whether a similar concept also applied to urban change projects. 84% of respondents agreed that it did and only 6% felt that it did not apply, the others being undecided. From this we concluded that there was a valid analogy.

3.1.3 This conclusion was confirmed by the case studies and is in line with the description of voluntary organisations given by the Wolfenden Committee in *The Future of Voluntary Organisations*:

— "They are as different from each other as the ant is from the elephant or the whale from the hermit crab. But they all have in common with each other the characteristics that they are born, they live and grow, and they are liable to die."

3.1.4 Although the decline stage of a project might pose some interesting issues, we decided that it was not relevant for our enquiry, for it would not be in line with

public policy to try to support projects that no longer addressed high priority needs. We therefore concentrated on the first four stages. We also preferred to use action oriented words to describe them:

— **Developing a Project**

— **Getting Going**

— **Coping with Growth**

— **Doing Even Better**

3.1.5 From our initial interviews and a review of the literature, we established, what at each stage were the principal management tasks — what had to be done to avoid or overcome the problems most likely to occur at that stage. Through the case studies, regional workshops and discussions with training organisations, we explored the main issues and the various types of training and support that would be most appropriate for an inexperienced manager at each stage. During the course of this work we came across many good ideas on how to tackle problems, and found that much has been written about them. However the information is fragmented and often contained in publications with limited circulation. It is difficult to know where to look for what information. In our regional workshops we repeatedly found that different groups from the same area had faced or were facing similar problems without being able to draw on any one else's experience. We concluded that a single **handbook** giving practical advice and information on all the main management issues would be very useful. We have prepared a draft of a Project Management Handbook with sections dealing with each of the four stages of development. In this report we concentrate on the implications for management training and support at each stage.

3.2 Developing a Project

3.2.1 To turn an idea into a project is a major achievement in itself. Although our research was mainly concerned with ways in which established projects could be better managed, we could not avoid hearing of the difficulties of getting started. The great majority of ideas never become projects. Obtaining financial support is seen as the over-riding obstacle, so much so that getting approval from a funding body becomes an end in itself. Thus more attention may be given to selling the proposal than to thinking through, or **planning**, how the project will work in practice.

3.2.2 One conclusion that we drew from the case studies was that many of the problems encountered later on could be traced back to inadequate initial planning. For example,

— Where objectives and priorities are not clearly spelled out damaging conflict may arise later

— A good plan can identify major transition points in the project, allowing steps to be taken to prepare for them in good time rather than just waiting until the problems occur

— A common complaint from voluntary projects is that they find they do not have enough money for some expenses vital to the health of the organisation, including training. However, usually no allowance was made for them in the original budget.

Analysis of the management problems which came to light in the DoE's "Guidelines Monitoring" of projects also confirmed that on both local authority and voluntary projects they arose mainly from the initial design of the project (**Exhibit 10**). Thus **good planning** at the start of a project is extremely important.

3.2.3 Many problems stem from unclear or unrealistic objectives. It is all too easy to promise to do too much too quickly, and it is often tempting to do this in order to impress potential sponsors, but looking back it can be seen that many successful projects implemented their ideas in stages, taking time where necessary to involve people and building one achievement on another. Preparing a plan is a way of thinking through, step by step:

— how the idea will be put into practice
— why it will work
— what resources will be required
— who needs to do what
— what the results will be.

While it is perfectly possible to develop a whole plan in one's head, it is better to write it down so that everyone can understand and agree what is to be done. This will avoid confusion later on, and it helps to ensure that an inexperienced manager thinks through the project and works out what needs to be done and who will do it. Furthermore a written plan goes far beyond a brief description of the project (which is often all that application forms require) and will allow responsible sponsors and others to help identify pitfalls or opportunities for improvement.

3.2.4 Project planning is not always easy. Many managers do not plan either because they are in an unfamiliar field and do not have enough information about it, or because they do not wish to commit themselves to achieving specific results in an uncertain world, or because they are not absolutely clear as to what it is they are trying to achieve. There are, of course, advantages in having imprecise objectives, particularly when a number of parties with different interests have to be brought together, but if the real objectives are

not clearly sorted out there is likely to be trouble sooner or later. The best way of dealing with uncertainty is to choose the most reasonable targets to start with and be prepared to modify them in the light of periodic reassessments of the project.

3.2.5 We did not, however, find in the case studies that the successful projects had all started with well written plans. Nevertheless those running the projects, did have a clear understanding of their current objectives and how they were going to reach them. They had also communicated this effectively to the others working on the projects, even though they had developed into new areas since they began. Thus it is the **ability to plan** — to recognise and set relevant and attainable objectives, to know what needs to be done to achieve them, and to make sure that everybody knows what their role is — rather than the written plan in itself that is important. However, the preparation of a plan at least ensures that the project has been thought through and provides a check on an inexperienced project manager's planning ability before a project is approved.

3.2.6 We recognise that it would be wasteful and unfair to insist on detailed plans from all applicants, when most projects will inevitably be refused funding. For small projects (where total expenditure does not exceed, say, £50,000 per annum or £100,000 over the life of the project) simple proposals may well be adequate. Also, since each local authority already prepares an urban change strategy as part of its UP submission, it should not be difficult to identify the projects which are strong candidates for funding. It is only for these comparatively few projects for which detailed plans should be required. Thus, although every effort should be made to encourage ideas to be put forward both by voluntary organisations and by local authority departments, early identification of the high priority projects among them is important. A **two-stage application process** is therefore desirable, and Leicester City Council, for example, is already taking this approach. Initially just a simple application form is required. Only selected projects have to prepare detailed plans for final submission. Concentration on fewer projects following an initial screen should lead to better planned projects and should also ensure that assistance with project preparation is targetted on those situations in which it is most needed, so that really good ideas do not fall by the wayside before they can be turned into projects.

3.2.7 We also found that in some places, for example Birmingham, the local Council for Voluntary Service managed to establish a seed capital fund to enable groups with no resources to prepare better plans. This type of initiative should be encouraged.

Exhibit 10 In Both Local Authority and Voluntary Projects, Problems Often Arise from the Initial Design

103 PROJECTS ANALYSED: 31 VOLUNTARY SECTOR 72 LOCAL AUTHORITY

PROJECTS WITHOUT MANAGEMENT PROBLEMS

69
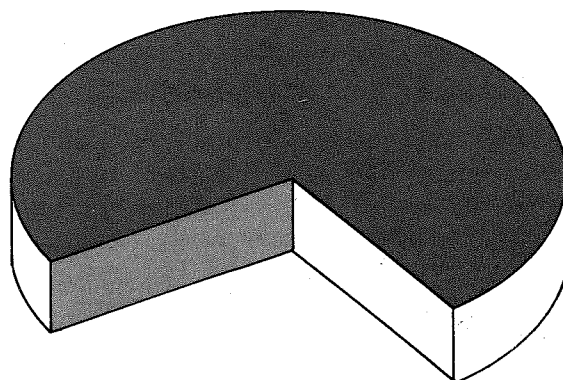
PROJECTS WITH STATED MANAGEMENT PROBLEMS

34

LOCAL AUTHORITIES | *VOLUNTARY ORGANISATIONS*

20   14

PROBLEMS
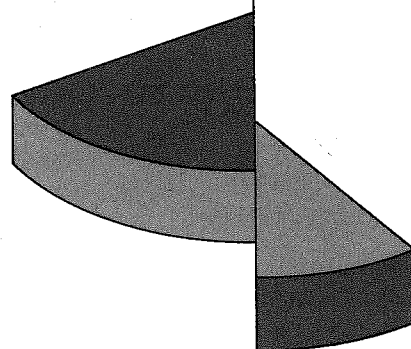
	LOCAL AUTHORITIES	VOLUNTARY ORGANISATIONS
Project Design	19	13
Staff	11	5
Finance	4	5
Building	1	5
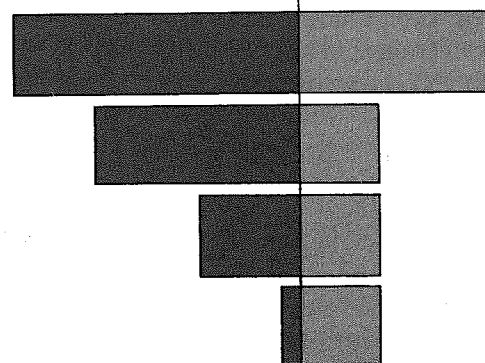
Source: URBED Analysis of DoE 1986 Guidelines Monitoring Questionnaires

Implications for Training

3.2.8 The starting point for a successful project is the combination of:

— a scheme which addresses high priority local needs

— a well thought through plan

— an entrepreneurial project manager with the necessary vision, concern and persistence.

Furthermore, those involved in approving projects must be able to recognise these factors. Good **information** is most important at this stage. First of all there needs to be clear information on local priorities, funding criteria and application procedures. Small voluntary groups, in particular, often have little knowledge of UP and other grant regimes, or how local authorities and other potential sponsors work, or even who to contact. Many project managers complained of the difficulty of obtaining the right information in time to put in properly targetted proposals. As there is a need for coherent strategies it is right to expect the public sector to set the framework, which includes encouraging suitable projects by voluntary organisations. Currently the local authority is the body most appropriately placed to do this and where **link officers** have been appointed to work with voluntary groups the flow of information has improved. In most areas there are also local Councils for Voluntary Service (CVS's) and other local development agencies (LDA's) which can provide information and support, although their resources and capabilities vary widely.

3.2.9 Information is also a basic requirement for project planning. As there is now considerable experience of many types of urban change project, good information should usually already exist. The problems for the inexperienced manager are how to find it and how to use it to decide what to do. From the case studies it was evident that **information** and **advice** from other successful projects were most useful. For example,

— TechNorth in Leeds used Nottingdale ITEC in London as a model

— At Castlefield Park they pay tribute to lessons learned from Lowell, Massachusetts.

The DoE is already starting to publish case studies and guides to good practice, and this should be welcomed and encouraged. Project initiators also need to know about relevant models in their area, and there is a need to provide better access to such basic information. The proposed Project Management Handbook could be one vehicle for supplying relevant and timely information, but the whole process of providing access to information and advice needs to be treated systematically. This is discussed further in Chapter 6.

3.2.10 We repeatedly found that project managers were keen to learn from others' experience. Those who attended the regional workshops and the action learning sets valued the opportunity of discussing their projects and experiences with other project managers. Many felt that **visits to other schemes** were exceptionally valuable, especially during the early stages of their own project. Our survey of project managers showed that 48% had visited other projects as a deliberate part of their learning process. Simple steps to encourage visits to other projects should therefore make a valuable contribution to training.

3.2.11 Inexperienced project initiators may also need help in developing their plans and applications, in putting together a project team and in negotiating for resources. They face tasks which are analagous to those of starting up a business, and experience has shown that one-to-one or group counselling is the most effective way of providing such help. (Indeed in the last ten years a network of some 250 local enterprise agencies has been established throughout the country to provide counselling for small businesses, particularly at start-up). Those starting urban change projects could receive counselling from local authority officers, from a voluntary sector agency (such as the local CVS) or from individuals from the private sector (who might, for example, join the project's management committee). Many project managers have received help from these sources and found it valuable, but many more of those we spoke to felt they had had inadequate support or did not know where best to turn to for help, especially at the outset. In time, experienced project mangers develop their own personal networks of contacts from which to derive support, but, as Murray Stewart and Gill Whitting pointed out in *Ethnic Minorities and the Urban Programme*, very little is known about applications which fail to attract funding, and it is possible that better access to counselling at an early stage would have enabled some of them to have been turned into worthwhile projects.

3.2.12 At the planning stage, therefore, project managers need good information and they may also need advice from someone who understands how projects are set up and managed, and is familiar with the requirements of potential sponsors. Local authorities have a particularly important role to play as, at least as far as UP is concerned, they have to assess and approve the project proposals. This is not at all easy. On the one hand it is necessary to encourage projects that are innovative and which might make a substantial impact; on the other hand no-one wants to approve projects which subsequently fail. While we did not research the subject in depth, several people mentioned the difficulty of assessing projects. (The Local Government Training Board has recognised the similar difficulties that are involved in assessing economic development projects and is preparing training material for Economic Development Officers). It is relatively easy to make a professional judgement of the technical feasibility of a project, particularly a capital project, but it is more difficult to assess its 'manageability' — whether it is likely to be carried through to a successful end-use. However, such an assessment can be very helpful to a project. This does not, of course, mean that only

Exhibit 11 A Simple "Project Manageability" Check

1.   Does this project address high priority needs?   _____

2.   Is there a properly thought out plan?   _____
        — Is the management team fully committed to it?   _____

3.   Are the objectives clear and realistic?   _____
        — Will the outcome/end use of the project be sustainable?   _____
        — Is the timescale realistic?   _____
        — Are there adequate mechanisms for monitoring progress?   _____

4.   Is the project feasible?   _____
        — Was an adequate feasibility study done?   _____
        — Is there a successful model/precedent for the project?   _____

5.   If reasonably successful will the project outcome(s) provide good value for the money spent?   _____

6.   Is the project innovative or of special significance?   _____

7.   Is there genuine local community involvement in the management of the project?   _____

8.   Is the project managed by an ethnic minority or other priority group?   _____

9.   Is the current team capable of managing the project?
                                        Definitely Yes   _____
                                        Probably   _____
                                        Probably with support   _____
                                        Definitely No   _____

10.   What are likely to be the major areas of weakness?
                                        Lack of persistence/commitment   _____
                                        Lack of concern/dentity with client community   _____
                                        Lack of technical skills   _____
                                        Lack of administrative skills   _____
                                        Lack of entrepreneurial skills   _____
                                        Other ....   _____

11.   What types of help/support are required/available?
        (Write in requirements; underline what is available)

	Within Project	Mgt. Cttee.	Advisers	Info/Courses
Technical	....	....	....	....
	....	....	....	....
Administrative	....	....	....	....
	....	....	....	....
Entrepreneurial	....	....	....	....
	....	....	....	....

12.   Has adequate allowance been made for this in the plan/budget?   _____

13.   Does the project have sufficient resources to succeed?   _____

RECOMMENDATION

        ____ **Reject project**
        ____ **Accept project**
        ____ **Accept, subject to the following support** ....

        ....

        ....

experienced managers should be allowed to run projects, for one of the essentials of urban change is the development of managerial capability within the inner city communities. Thus it is important to encourage innovative projects and inexperienced managers. Just as **planning** is useful in ensuring that a project is properly thought through, so **assessment** is an important step in ensuring that a project is properly resourced. In particular a brief **'Manageability Check'**, (as for example set out in **Exhibit 11**) can ensure that, before approval, some systematic thought has been given to the management of a project, and especially to the external support that it is likely to require.

3.2.13 Thus not only do project initiators and project managers need help in learning to plan, but also those who support projects, particularly certain local authority officers, need training in project assessment.

3.3 Getting Going

3.3.1 Once a project has obtained funding it faces a new set of problems. It is expected to get into action without delay, even though 12 to 18 months may have been spent waiting for approval to come through. The initial tasks are mainly administrative and organisational. They usually do not pose great difficulties for large established voluntary organisations or for local authority projects except where the authority sets up a Special Purpose Organisation outside the normal departmental structure to undertake the project. For example,

— When Sheffield City Council set up a Women's Technology Training Workshop not only was a separate legal organisation required in order to obtain exemption under the Sex Discrimination Act, but it was also located in a building of its own so that it could be seen to be run exclusively by women for women.

Special Purpose Organisations and small voluntary organisations face the same sorts of problems in getting going. They both have to create an organisation as well as start the project.

3.3.2 The principal management tasks at this stage include:

— **Getting organised** (e.g. finding premises, recruiting staff, defining roles, setting priorities, organising basic administration)

— **Making collaborative management work**

— **Measuring progress**

— **Communicating with the outside world**

as well, of course, as starting the actual project work.

3.3.3 The precise steps required for **getting organised** will depend on the size and type of project and on the previous history of the organisation. Even when an organisation is starting from scratch the planning process will have ensured that considerable thought has already been given to the immediate issues, such as where the project might be located and how many staff will be required. While getting organised often takes longer than expected, most of the individual tasks are reasonably straightforward. A considerable amount of information and advice on how to set about them is already available. There are, however, a number of more difficult issues which need to be addressed.

3.3.4 We found that many voluntary projects wanted to practise a **collaborative style of management**, so that everybody on the project would have some involvement in the making of decisions and the allocation of responsibilities. In some instances those setting up the project had a definite mangement style in mind. In others there just seemed to be a dislike of hierarchies, perhaps because the people involved felt that they had too often been at the wrong end of them. 'Collaborative management' can mean many things. At the workshop which we held on this subject most people felt that regular participation by all the staff in policy discussions — so that no-one felt excluded — would probably be sufficient. But some of the case studies showed that unless the management system **and the priorities of the project** were clearly defined and understood internal conflict could easily occur. The elimination of hierarchies does not eliminate the need for mangement, and it makes the management process harder.

Thus the projects which have the least problems with participative management are ones where great care has been given to setting up the system. For example,

— Co-operative Design Services in Cardiff drew on advice from an Industrial Society consultant to set up a system of meetings which ensure that everyone is informed and can have their say, yet which still leaves enough time for getting on with the job.

3.3.5 **Measuring progress** is another difficult area both for local authorities and for voluntary organisations. In the past it may often have been largely ignored, and some private funding agencies have said that once they had made a grant their only real concern was to ensure that no scandals occurred. The DoE has recently introduced its Urban Programme Management initiative requiring quantified forecasts and clear objectives for each project and regular reports of progress towards them. For the DoE, quantification is important so that results for UP as a whole can be produced by adding up the results of all the separate projects. However, it is also recognised that the **quality** of project outcomes and other harder to quantify aspects (such as progress towards self-sufficiency) may be more important. And the introduction of UPM, while causing anxiety, has stimulated many projects into thinking how best to measure and evaluate progress.

3.3.6 The precise format for evaluating progress can vary. For example,

— At TechNorth responsibility for different elements

of the project was allocated to individuals who reported progress at regular co-ordination meetings attended by key staff

— Windmill Hill City Farm set time aside for wide-ranging review sessions and used monitoring and

follow-up assignments as a means of training people as well as reporting results. Both staff and management committee members attended the meetings.

The underlying principles, however, are the same:

— have a clear understanding of objectives (underlying long-term, as well as short-term targets)

— collect, record and analyse appropriate data

— make sure that the interests of all the principal parties (e.g. clients, sponsors, staff) are included. Seek direct feed-back from them where possible

— discuss results and implications openly in the appropriate forum

— agree, communicate and implement changes if necessary.

One of the characteristics of entrepreneurial management is the willingness and ability to make periodic adjustments to the project in order to keep it on course and within its resources. To do this successfully it is necessary to be able to take stock of progress and to focus on objectives rather than just day-to-day activities. It is the project manager's responsibility to do this and to organise a format for doing it that is both effective and compatible with the project's overall management style.

3.3.7 Looked at in this way, measuring or monitoring progress is a fundamental tool of internal management, not a threat imposed from outside. It is, of course, necessary to take the sponsors' interests into account as an objective (Are we meeting their requirements? Are we keeping the financial records they require?), just as it is important to consider internal objectives (Is everybody enjoying their work on the project? Are individuals developing their skills?) as well as the underlying client-related objectives (Do the clients — as well as the statistics — say we are doing a good job?).

3.3.8 Another issue which needs to be addressed early in the life of a project is **communicating with the outside world**. To be successful a project must be seen to be successful. It is surprising how long it can take to build up trust and recognition, and successful project managers always seem to be on the look out for opportunities to expound the virtue of their project. Obviously the greatest need is for communication with, and feedback from, the clients whose needs the project is addressing and potential sponsors. If the clients are not aware of the benefits that the project offers they will not support it, and if potential sponsors are not convinced that the project is having a real impact or is indispensable it is unlikely that future funding will be forthcoming. At the workshop which we held on communication, many agreed that it was a subject that

was often left until too late. Only when initial funding began to run out was a desperate attempt made to communicate — and then, without a proper budget.

3.3.9 Communication does not have to be sophisticated or expensive, but it does have to be positive, consistent and well targetted. It usually consists of a mixture of printed material and personal advocacy. While some project managers are seen as being naturally good communicators, good communication can in fact be effectively planned. Furthermore, the project manager does not have to do all the work personally or even take the lead (except in personal advocacy and key negotiations). What is important is that the communication process is properly planned and managed, for the future viability of the project greatly depends on it.

3.4 Coping with Growth

3.4.1 Some projects remain small, but many others find a growing demand for their services or that there are other activities with which they can become involved. For example,

— Handsworth Employment Scheme started in 1979 as an advice centre with one employee, and added sequentially a training workshop, a 200 place Community Programme agency and a business development unit

— Apart from providing basic counselling for new and small businesses, Hammersmith and Fulham Business Resources Ltd. has a policy of adding one new service every year (e.g. a training sourcebook, a business club).

Growth not only means that everybody on the project is very busy, but it also puts another set of strains on the organisation. Those which cause particular problems include:

— **Motivating staff**

— **Developing a building**

— **Dealing with conflict.**

3.4.2 At this stage of the project the full range of the entrepreneurial management skills are required. It is sometimes thought that once a project is established entrepreneurial skills are no longer required and that administrative skills become dominant. But it is dangerous for the original project manager to leave a successful project too early, particularly before long term financial stability has been ensured. Indeed as a result of growth the project manager may no longer be able to perform all the key functions. This means that results will have to be achieved through other people, bringing all the entrepreneurial skills into play.

3.4.3 **Motivating staff**, especially those who were not part of the original group, now becomes an important managerial task. Team building and leadership are the keys to success and while some people find that they are naturally good at these, the basic skills can be learned and improved with practice. The task will be easier if the management foundation work has been well done and there are clear objectives and priorities, shared values and agreed procedures. Building a productive team takes time and energy and like all the entrepreneurial skills discussed here it can best be learned by experience. Understanding some of the concepts and techniques can be helpful but, as interactions with other people are involved, theory without practice is of limited value.

3.4.4 Furthermore, high staff turnover, which affects both local authorities and voluntary organisations, makes team building more difficult, and this can be a particular problem where staff costs are paid under the MSC Community Programme and individuals have to leave after the standard twelve months. Also, in local authorities, departmental and professional boundaries remain very strong, in spite of the recent vogue for corporate management. Although successful cases show that such barriers can be overcome (Section 3.7) they make the task of a project manager even harder. As a project grows and develops, motivating staff can become a major activity.

3.4.5 Another completely different problem that successful projects often face is that of **developing a building**. It is frequently a great advantage to have purpose-built premises, and since it is easier to obtain capital than revenue funding under UP many projects involve the development or conversion of a building, although this is only incidental to the long term aims and activities of the project. For example,

— TechNorth, an information technology training project, converted an old tram depot for its use

— SADACCA created a community centre out of a large derelict factory.

3.4.6 Even where the actual building work is supervised by professionals hired for the purpose, the project manager and the management committee are likely to be faced with technical and managerial problems, involving very substantial sums of money, which are quite outside their experience. These include:

— understanding the process of developing a building

— finding a suitable building and devising a sustainable mix of end-uses

— securing ownership

— commissioning and funding a feasibility study

— selecting the appropriate development approach

— packaging funds from different sources

— picking the right professional team

— reacting to unexpected changes as the work progresses

— ensuring that the conversion is carried out on time and within budget

— managing the completed building.

A clear understanding of and commitment to, the end-use for the building is vital, for the building professions cannot be expected to make all the right trade-offs themselves. On the key points at least a great deal of effort and persistence may be needed to discover all the facts and to negotiate the best solutions, bearing in mind what is really important for success.

3.4.7 Growth and transition, including moving into the project's own building, put strains on any organisation which sooner or later lead to internal conflict. Conflict is normal in social organisations, but well established organisations have managed to develop processes for **dealing with conflict**. It is therefore in the smaller and younger organisations in the voluntary sector where these difficulties will be most marked, and also where the least experienced project managers are likely to be found.

3.4.8 If sufficient attention has been paid to ensuring that the objectives and priorities of the project are understood and agreed, and if the formal management processes allow adequate opportunity for everybody to make their views known, much internal conflict can be avoided or defused. Nevertheless there is always a potential for conflict in voluntary organisations where different groups have different values. The most common differences are those between paid staff and volunteers and between management committee and project staff. For example,

— A counselling service staffed entirely by unpaid volunteers grew so successfully that it decided to take on a paid co-ordinator to organise rotas and recruit and train new volunteers. But the volunteers resented this and were less willing to put themselves out. Eventually the project reverted to management by an elected group of the volunteers.

3.4.9 Most differences between paid staff and volunteers can be overcome by sensitive management. Volunteers do not require money, but they do want recognition and maybe other rewards, and it may be far easier for the project to provide these than to pay money. It is up to the project manager to work out what rewards each individual or group wants and, if possible, negotiate agreements that benefit all sides. Difficulties between the management committee and project staff may be more difficult to grasp as the 'ownership' of the project is involved. Furthermore it is not clear which side should take the initiative in sorting the matter out. If there are strong personalities on both sides who have

different perceptions about the project, then a parting of the ways is almost inevitable:

— In nearly all of the case studies which local authorities had created a quasi-independent Special Purpose Organisation to set up a project, the original project manager left when the authority later started to integrate the project more closely into its mainstream operations.

3.4.10 However, it also seems clear that little thought is given to the role and development of the **management committee** as a project develops. In small voluntary organisations committee members are usually chosen either because they were part of the original interest group or because they represent powerful bodies including sponsors or because they are members of the local community who can find the time. The result is often a group of amateurs with a few 'professional' committee members who are probably too busy to attend regularly and whose fundamental loyalties lie elsewhere. It is not surprising if there is wariness or even tension between the committee members, who hope that all is going well so that they will not be called upon to sort problems out, and the project staff, who see the committee as having an important influence over their futures, but are not sure what it really wants or whether it will be able to ensure future funding for the project. Management committees can therefore become ineffective, or even a source of additional problems. This is a pity because not only could individuals on the management committee help to provide the support which so many project managers find they lack, but also because through membership of an effective management committee local people could learn management skills and self-confidence which could be fed back into the community.

Implications for Training

3.4.11 Once a project gets started, and right through its growth stages, the project manager needs to be able to apply entrepreneurial skills to a succession of problems which a project is likely to encounter. These skills are best learned by **experience** and though formal or informal **on-the-job training**. Even so, the range of situations which might arise is so great that there is no set pattern of training which can be prescribed. A certain amount can be gained by mastering techniques (e.g. writing 1-page project summaries to ensure that everybody understands the priorities, running meetings, making interesting presentations) and there are even techniques for analysing training requirements. But for the inexperienced manager, one of the most effective approaches to problem solving is to look for advice from someone who has faced a similar situation and who can be trusted. There are many potential sources of advice for project managers, including:

— management or steering committee members
— local authority officers

— local development agencies
— other project managers
— training organisations.

The case studies show that experienced project managers begin to build up their own networks of contacts and supporters, whereas others complain of feeling isolated or, in local authorities, of being out of the mainstream. In Chapters 5 and 6 we look at what training is available and how any gaps might be filled.

3.4.12 In addition to entrepreneurial skills, a project will also need administrative skills and project-related skills, although it may be someone other than the project manager who requires them. Administrative skills can be taught by conventional methods (although back-up advice is often useful too), but project skills can be so varied that each situation needs to be separately assessed. At the time that a project is approved an assessment needs to be made of the skills required and the skills available to the project in all three areas to ensure that there is a reasonable chance that the problems likely to be encountered during start up and growth can be coped with successfully. From the case studies we found no evidence that this is being done systematically, except where the project itself was about training and in one case where a large voluntary organisation, NACRO, had organised several similar projects throughout the country

— NACRO has produced a Neighbourhood Self-Help pack which is "treated like a Bible" . . . "You don't follow it exactly but there are very useful guidelines . . . It is useful because it is produced by people who have gone through it before and it deals with practical issues."

3.5 Doing Even Better

3.5.1 Once a project becomes well established its external operations and internal procedures should be more stable and management problems should ease. This was confirmed in our initial survey

— While 74% of respondents felt that management training was required most in the early stages of a project, only 10% thought that it was most needed when a project had reached maturity.

In practice, however, a mature voluntary project will still be in a fundamentally unstable position until it has found a permanent source of funding. This is a particular problem for UP funded projects because, however well they succeed, that funding will inevitably cease and a new source will have to be found. So far, the great majority of time-expired voluntary UP projects have managed to obtain either mainstream local authority funding or an extension of UP, but there is no guarantee that this will continue to happen. Indeed the main management tasks which we identified at this stage were:

— **Ensuring long term survival**

— **Working in partnership with the local authority.**

3.5.2 There are several strategies which a group can follow to increase its chances of **ensuring long term survival**. It is at this stage that past effort in building up a good network of allies and in communicating results — so that the project is seen as indispensable in the eyes of potential funders — will pay off. It is too late to start doing them at this stage; they both require a long time to build up. This illustrates once more the importance of helping project managers to anticipate major problems and to find out how to solve them in good time.

3.5.3 Under UP the local authority is seen as the immediate funding source for voluntary projects, and it is therefore essential that these two sectors find ways of working better together. From our contacts with a great number of projects through the case studies, regional workshops and action learning sets, we found that relationships between them were often strained, in spite of some very good personal contacts.

3.5.4 The situation, however, is different in different areas. Some local authorities have fully recognised the role of voluntary organisations in community and local economic development; others are only just beginning to do so. As might be expected it is the relationship between the local authority and the small voluntary group which is most problematic. The former has a rigid structure and is under strong financial constraints; it therefore finds it difficult to make changes to accommodate others. The latter lacks experience and does not really know how to get the best from the public sector by **working in partnership with the local authority**.

3.5.5 Since urban change and community development must be locally based, the local authority is, as previously noted, the public sector body most appropriately placed to support voluntary organisations involved in urban change. Many local authorities are already trying to create a partnership with the voluntary sector and have managed to find resources to do so in spite of severe financial constraints. As Chapter 2 has shown, small voluntary organisations in particular need support. In practical terms this means, at the least, providing clear information (e.g. on urban change strategy, council policies and processes, contact points, funding and assessment), appointing link officers and acting in partnership with local development associations to help inexperienced project managers in obtaining access to relevant networks and information.

3.5.6 Partnerships, of course, are two way processes. In return for support from local authorities, voluntary organisations need to recognise the constraints under which public bodies work, especially their concern for public accountability and their need for information by certain deadlines and in certain formats (regardless of how irrelevant they may appear to the purpose of the project!). In the case studies we found many examples where emphasis on administration was seen as enhancing rather than detracting from the project:

— **At SADACCA** special emphasis was put on always having the figures ready on time. "It helps them develop confidence in us." A trained financial controller has been appointed

— The Women's Technology Training Workshop not only took on a former council employee as administrator so that they never had any problems with the local authority over paperwork, but they also let the Council's Finance Department keep their accounts and make all their payments through its established systems.

3.5.7 Poor organisation can, of course, hinder any undertaking and poor financial control can at the extreme allow fraud to occur. But it must be remembered that this is extremely rare

— Only one project in over 100 was detected as "failing to conform to Guidelines" in the 1986 Guidelines Monitoring exercise, and that was principally due to campaigning.

There are a number of steps which could be taken to improve financial accountability and these are covered in the Project Management Handbook, but it is important to balance against this the basic objective of letting members of the local community take responsibilities and gain confidence and experience. To keep matters in perspective, it should be remembered that venture capital organisations (which fund the entrepreneurial projects of the private sector) expect to lose all their investment — for whatever reason — in one project out of every three.

Implications for Training

3.5.8 As a project reaches maturity there is less need for project management training and more conventional approaches can be taken towards filling gaps in knowledge or skills (e.g. administrative skills, health and safety at work), although if a project manger leaves and is replaced by a less experienced one, training will have to start again further back in the cycle. Ideally the original project manager should stay in post until the question of permanent funding has been resolved as this calls for entrepreneurial skills and the use of as many allies as can be mustered. But in addition there is a general need for voluntary sector project managers and local authority officers to understand each other's organisations and shared objectives. There is a general need for urban change to become more central in the thinking of inner city local authorities, not just in the Chief Executive's office but right down into the main departments. Furthermore, training sessions themselves can provide an opportunity for people from both sectors to come together and to build relationships and understanding. Joint training should therefore be encouraged by both sides.

3.6 Ethnic Minority Projects

3.6.1 During our research we looked at the special management problems which ethnic minority projects might face. The majority of the ethnic minority populations live in inner cities, and urban change projects are vitally important to them. UP is particularly important as it can provide finance for projects which minority groups can feel that they have real control over, and the Ministerial Guidelines emphasise the need to give "due priority" to "projects designed to benefit disadvantaged minorities such as certain ethnic groups."

3.6.2 In general, we found that ethnic minorities see themselves as having all the needs and disadvantages which are common to other inner city dwellers, plus many additional ones relating to maintenance of culture and identity, integration into a foreign society, and dealing with racial discrimination, which although very basic are not adequately addressed through mainstream programmes. Furthermore in most inner cities there are several different ethnic minorities each with distinct needs. Thus there is potentially a high demand for ethnic minority projects, and the number of projects has grown rapidly in the last few years, albeit from a low base. However most of these projects are "for the benefit of" ethnic minorities, only 7% of all projects being "managed by" ethnic minority groups. Yet it is widely stated that it is through involvement in the **management of schemes** that community development takes place. For example,

> — Handsworth Employment Scheme could have expanded faster but it chose to ensure that management positions were filled by local black people, even though this meant delays while suitable candidates were found or trained.

3.6.3 The case studies included examples of excellent projects managed by ethnic minorities and we took care to ensure that ethnic minority projects were well represented at the regional workshops. Two separate workshops focussed on the issue of encouraging minority projects. We found that the problems which ethnic minority projects complained about were very similar to those about which all small voluntary projects complain:

> — difficulties in getting funded
> — unsympathetic local authorities
> — lack of information and support
> — pressure on time and resources
> — difficulties in enlisting a good management committee.

Indeed these difficulties characterise what we have called the **unsupportive climate** in which voluntary organisations undertaking urban change projects find themselves.

3.6.4 However, there were two areas in particular where ethnic minority projects appeared to face even greater problems than others. First, the gulf between local authorities and ethnic minority groups is particularly wide, and there was a common feeling that many of those with real influence in the local authority did not understand or were not sympathetic to ethnic minority problems. Many of those we talked to attributed this to racism, either conscious or unconscious. This was a recurring perception and was emphasised in the case studies of projects with ethnic minority managers. It was even felt to lead to unsuitable projects being accepted, let alone to many of the right ones being ignored

> — "The basic problem is racism — the inability to distinguish between a competent and an incompetent black person. People from different cultures cannot communicate and bureaucrats cannot judge people . . . Those who have a loud mouth . . . tend to get the money."

> — "Afterwards when it was clear that we had succeeded, [one official] expressed his surprise and said: 'Frankly, we thought you were just humouring yourselves'."

Secondly, managers of ethnic minority projects find it very difficult to find their way into the right networks, or to get access to the information and advice they need, even though they perceive them as being important for success. A similar point was made in Aston University's *Five Year Review Of The Birmingham Inner City Partnership* — "white voluntary bodies were also more likely to have and use informal contacts in relevant departments . . ."

Implications for Training

3.6.5 The implications of these findings are that racism is strongly perceived to exist and that local authorities, in particular, should take special steps to ensure that the problems of the many ethnic minority groups in their area are understood. These must be adequately addressed in the authority's urban change strategy, and all those involved in choosing, advising or monitoring ethnic minority projects should receive basic training to sensitise them to the needs of minorities. Furthermore, as networks are so important, special attention should be given to ensuring that those running ethnic minority projects are helped to make appropriate contacts, especially at the start of the project. Not only should ethnic minority project managers be encouraged to visit and learn from other projects, but also managers of all types of projects should be encouraged to visit successful ethnic minority projects.

3.6.6 If, in practice, urban change receives the urgent priority which is now being talked about, and if the importance of local voluntary organisations is fully recognised, ethnic minority projects should benefit as greatly or more than any others. We did not look specifically at proposals which were refused funding, but

there is evidence that a disproportionately large number of ethnic minority proposals are being rejected (*Five Year Review of the Birmingham Inner City Partnership*). This would argue for support to be made available particularly during the project planning stage (Section 3.3).

3.7 Multi-departmental Projects

3.7.1 In the previous chapter we noted that there were certain large local authority projects which required new forms of collaboration between departments, while still needing to address unfamiliar problems. Since it is likely that multi-disciplinary projects will become increasingly important in urban change, because so many inner city problems are inter-related, we looked at the special requirements of such projects and the implications for training.

3.7.2 Many local authority UP projects can be handled within existing structures and these present no new organisational problems. Indeed those working on them may not even be aware that they are UP projects. But some projects do require unfamiliar multi-departmental collaboration, particularly large projects. For example,

— The Castlefield Park project in Manchester required collaboration between the Museums Department, Planning Department and Economic Development Department

— The State Mill project in Rochdale required collaboration between the Education, Employment, Architects and Planning Departments.

Such projects require classical **project management** skills, with their emphasis on setting priorities, co-ordinating, scheduling and budgetary control, as well as entrepreneurial skills. The evidence from other branches of the public sector and the private sector where project management has been gaining ground is that there is a need for powerful project managers, or general managers, who can weld together a team of different experts and ensure that the specified objectives of the project take precedence over those of any individual party. (See, for example, F. L. Harrison's *Advanced Project Management*).

3.7.3 True project management can only flourish in an organisation which accepts and practices a project management philosophy, where in the last resort the departments will yield to the authority of the project managers, and the Chief Executive is seen as presiding over a series of projects rather than departments, and the success of the organisation is measured by the success of those projects. Our initial questionnaire found that 74% of those involved in Urban Programme projects considered that co-ordinating the work of different departments was the major problem. And the workshop on **fostering interdepartmental co-ordination** showed that although there are great differences

between the ways in which different local authorities operate, none is close to having a project management philosophy — although many are finding that UP and other project based funding, such as the European Regional Development Fund, and the European Social Fund, are forcing them to move in that direction. However, it will take a long time for a project management philosophy to develop fully.

3.7.4 In the meantime, different local authorities are trying various mechanisms to improve co-ordination. Officer working groups are common, but usually not powerful enough to have much effect

— "They are often only there to keep people advised of someone coming up to knife them in the back."

— "You get stooges sent along and the meetings do not achieve anything."

— "Officers working groups in my experience have suffered from petty departmentalism."

Most people stressed that good inter-personal relationships between key officers were the best answer for the moment

— "Individual officers must get to form their own informal networks to get things done."

— "The informal networks are best. You can get round particularly intractable people this way, but it needs careful work."

— "I work the corridors and go and see the faceless people behind the signatures on the memos."

— "The Architects Department never responds to other departments' deadlines. However, I went to see the section manager and found that he liked the same music as me . . . I went to play at his folk club and the job was finished in four weeks."

Implications for Training

3.7.5 Project managers will not just appear out of present local authority structures. They need to be trained not only in classical project management skills but also in the entrepreneurial skills previously described. They will need strong support from the top as some basic attitudes have to be changed

— "Those who organise teams in local authorities don't get promoted."

— "The caricature of a local authority officer is tea-drinking and putting things off till tomorrow. I have always had a horror of this view and I have tried to be someone who gets things done, but I also get everything given to me."

— "Nobody ever gets promoted for managing a good project. It is the departmental work that still counts."

3.7.6 Since training is seen in local authorities as a way

of increasing status and improving career prospects as well as upgrading skills, it is important that training for those who are to manage the very large urban change projects should provide them with a qualification with high prestige. We therefore concluded that the idea should be examined of setting up a **post-gradual level course in project management** at a prestigious institution (such as a Management Centre or a leading university), which while primarily aimed at local government officers would also attract people from central government and the private and voluntary sectors.

3.7.7 On-the-job training and short courses can also be of great value, not only in imparting skills but also in helping to build teams within and across departments, and between local authorities and other sectors.

3.8 Conclusion

3.8.1 Discussions with those involved in running projects confirmed that, while an entrepreneurial management approach was basically required throughout, the management tasks did vary according to a project's stage of development. Since support must be timely as well as relevant this has obvious implications for training, particularly that **on-the-job support**, especially practical **information** and informed **advice**, is required rather than intensive pre-training (except in the case of large multi-departmental local authority projects). It was found that initial project planning was often inadequate and this could lead to trouble later on. There is a need not only to help people plan better projects (e.g. by supplying better information, encouraging visits to established projects) but also to train local authority officers in project assessment, including the ability to assess project manageability. While the adequacy of the present provision of training is considered futher in Chapter 5, we were also able to make certain specific recommendations relating to ethnic minority projects and multi-departmental projects.

Chapter 4   Recruiting Project Managers

Project managers have a difficult job, with many potential problems at each stage. The principal skills that they need are best learned through experience and are not easy to teach by conventional means. It might, therefore, be sensible to encourage the selection only of experienced people as project managers and thus save all the trouble and expense of providing training. This chapter examines how project managers are recruited and whether more emphasis should be placed on finding those with management experience.

4.1 The Recruitment Problem

4.1.1 Interviews with voluntary sector organisations, local authorities and personnel selection experts indicated that it is mainly the small voluntary organisations which have difficulties with recruitment. The large, well known voluntary agencies and local authorities have less difficulty, although local authorities, of course, tend to recruit departmental staff who then may later be given a project to run as part of their duties.

4.1.2 The underlying difficulty of small voluntary organisations is that they have little to offer the ordinary job-seeker — low pay, low prestige and no career structure. The task of recruiting the project manager falls on the management committee and it is often a thankless one

— "Applications for posts are often very small in number. We use job descriptions and project briefing sheets prior to interview, but candidates often still appear to have unrealistic expectations of what is going to be involved — particularly those who have not been involved with the voluntary sector before."

The problem is compounded when MSC funding has to be used for key staff costs

— "Community Programme salaries are not competitive, nor is the prestige of the projects well-rated."

Furthermore the funds available for publicising job vacancies are likely to be very limited

—" We use mailing lists of local voluntary groups to advertise and keep costs down. There is a complete lack of response to national advertisements, and

anyway the *Guardian* on Wednesdays is too expensive for a group like ours."

The recruitment process, therefore, often comes down to "selecting out the worst and taking whatever is left."

4.1.3 In our interviews various ways of tackling the problem were suggested. First, it is sometimes possible to promote an existing member of staff to the job of project manager. Unless a project is very fortunate in having management talent in depth, this is only likely to be sensible once it has reached maturity and project related skills are more important than entrepreneurial skills. This does not answer the question of how the original project manager was found in the first place. A second suggestion was to try to persuade somebody who was already interested in the problem, or the community which the project was aiming to help, to take on the job, or thirdly to try to find someone from outside the voluntary sector with management experience.

4.1.4 With new projects the project manager often does evolve out of the group that originated it. For example,

— The driving force and project manager of Pallion Residents' Enterprise in Sunderland was a founder member of the residents' association which came together to "do something" about unemployment and the decline of community spirit

— The same group of planners have been involved in the Nottingham Lace Market project since its inception 15 years ago, seeing it through all its stages of development

— The present project manger of SADACCA in Sheffield was a member of the management committee who was persuaded to take on the job when the project's old premises were burned down and it was decided to reformulate the scheme on a much larger scale.

This approach has the definite advantage that such project mangers are likely to have the necessary attributes of **concern, vision** and hopefully **persistence**, but they may or may not have any previous managerial experience. Indeed if people with entrepreneurial skills and experience are required, the obvious place to look for them would be in the private sector.

4.2 Recruiting From The Private Sector

4.2.1 The case studies provide a number of examples of individual managers from the private sector who have run very successful urban change projects. For example,

— Hammersmith and Fulham Business Resources is run by secondees from the clearing banks. Much of their work concerns financial counselling and planning for small businesses, a subject in which they are both experienced and personally interested

— The original project manager at TechNorth in Leeds had small business experience as well as being a college lecturer, and found all his skills useful on the project. However he was also a local resident and directly concerned with the problems the project was addressing.

There are also specialist agencies such as Action Resource Centre (ARC) and Business in the Community (BiC), which organise secondments from the private sector to the voluntary sector of either project managers or key support staff. Similarly, Retired Executives Action Clearing House (REACH) place retired executives into voluntary organisations. These placements work well because of the care that is taken. However there are also very substantial differences between the private and the voluntary sectors which means that individuals must be selected very carefully, or must select themselves, if they are to make a successful transfer.

4.2.2 There are several reasons why it is unlikely that the private sector will be a major source of project managers:

— Managers with entrepreneurial skills are in short supply in the private sector too, and are highly prized

— There are great differences (e.g. in attitudes, objectives, decision making processes and even tempo) between what is usual in a business context and what is usual in community development

— Individual managers may not have the local concern, vision and commitment necessary for a particular project.

The case studies also confirmed this view

— "One of the most important decisions we ever made was to refuse the first manager who was offered to us on secondment. It may seem rather ungrateful, but having the wrong person at the start would have done us a lot of damage"

— "In today's economic climate there is a lack of availability of suitable secondees."

4.2.3 Nevertheless there are some circumstances, such as the running of a local enterprise agency, where project managers coming from the private sector have been very successful. Also people with management experience can make significant contributions to the management of a project without being full-time project managers. For example, they can be members of a management or steering committee (and if they help ensure that it supports the project manager and the project team constructively

they will have made a substantial contribution). Alternatively, retired managers might help projects part-time on the administrative side, particularly in financial administration where they can not only help to increase the confidence of sponsors in projects but also help to train project staff.

4.3 Re-Cycling Experienced Managers

4.3.1 Once an individual has successfully run one voluntary project that same person ought to be in a better position to run another one, especially if it is in the same area of concern. This indeed is already happening

— "You can always tell which projects are put together by an old hand."

There is no real system for keeping track of such people or for knowing if they did a good job last time. It is likely therefore that the best use is not being made of the pool of project management talent that already exists in the voluntary sector.

4.3.2 The first steps are now being taken to develop systems of certification of 'community leaders'. This implies a belief that such people are trainable and that through experience they can build up skills which can be usefully transferred to other projects

— The Royal Society of Arts (RSA) is piloting a syllabus for certificating community leaders through local colleges and adult education institutes. It is based on continuous assessment and covers such management topics as internal and external communications, staff selection and management, budgeting and financial control, staff relations, health and safety

— Leeds CVS and the Centre for Community Education at Leeds Polytechnic are developing a certificate in Community Participation which will cover much of the same ground as the RSA model but will give greater emphasis to achievements on the job.

4.3.3 Nevertheless although professionalism and experience are greatly to be welcomed, they need to be additions to, not substitutes for, the concern, vision and persistence which are so necessary to bring about relevant change, and which are the hallmark of the voluntary sector at its best. If professionalism were the entire answer the problems of the inner cities would have been solved long ago.

4.4 Recruiting Skills

4.4.1 In our interviews we were told that small voluntary organisations are often weak in recruiting skills, and this can make the likelihood of finding a suitable project manager more remote. While this is not strictly a shortcoming of project managers, as

responsibility for recruitment of the project manager usually lies with the management committee, it does reinforce the point which was made to us several times during our study, and which we would endorse, that management committees need training as well as project managers. The recruitment issue shows how the same underlying management problems can affect different aspects of a project.

4.4.2 Further discussions on recruitment difficulties and 'poor interviewing skills' revealed that the root causes were usually either that the management committee was not clear on the objectives of the project (which is inevitably the case if the objectives are not properly defined) or that the committee was not clear about its own role and could therefore not define the precise responsibilities of the project manager

> — "The management committee often confuses its own role with that of the project manager."

> — "A key point is that the project proposal — which is written for funding purposes — often becomes the *de facto* job description for the project manager and is the root cause of much aggravation."

The result is that unnecessary problems, in addition to all those that the project manager must grapple with anyway, are created even on well managed projects. For example,

> — A counselling service, in reviewing its unfortunate experience with a project manager, realised that it had not properly defined what was wanted from the project manager in the first place. "First we thought we needed someone to do everything for us. Then we stressed the administrative side . . . The job description has to be clear and well defined. That's my advice to other projects."

4.4.3 Finally, we found from our interviews that selection of project managers was primarily based on technical and professional qualifications — just as project assessment was often based on technical feasibility. Management experience and ability came a poor second, and ability to work well with others was only occasionally taken into account. Yet even if recruiting skills were improved by appropriate management training it would not alter the fact that **commitment** and **concern** for the local community are important attributes. For this reason the most appropriate person to manage a given project may well be someone with entrepreneurial potential but without previous experience. Improvements in recruitment, although welcome, will not alter the need for on-the-job training of inexperienced project managers.

4.5 Conclusion

4.5.1 Even though there are many people with managerial skills in the private sector it is unrealistic to expect that they can transfer easily to the voluntary sector and run successful urban change projects in large numbers.

4.5.2 There is, however, scope for keeping track of and making better use of those in voluntary sector who have already run projects successfully. The initiative of the Royal Society of Arts should be followed with interest. However the basic fact remains that voluntary project managers need to be closely concerned with the community they are serving, and may well emerge from it.
This is perfectly appropriate as one effect of the project will then be the injection of management skills directly into that community. But it also means that projects will continue to be run largely by inexperienced managers and that the need to train them will continue.

Chapter 5   Providing Management Support

Project managers need and will continue to need management training and support, because many innovative projects will continue to be run by inexperienced managers, and indeed it is through such projects that local communities can gain self-confidence and learn management skills. The preceding chapters have described the types of skills required — principally **entrepreneurial** skills and **administrative** skills. This chapter describes the range of training that is available and also answers the questions:

—What forms of training do project managers find valuable?

— Why are training opportunites not always taken up?

— What gaps need filling?

It is based mainly on responses to the four questionnaires as well as on in-depth interviews.

5.1   The Purpose of Training

5.1.1 Our surveys showed that there is a large and expanding amount of training being provided for people who manage projects. Indeed training may be regarded as a growth industry. However, we also found widespread feelings among potential users that training is inadequate or unavailable

— 70% of respondents to the project managers' survey thought that inadequate attention was paid to management training in their organisations

— 65% of those involved in many aspects of UP thought that insufficient management training was available (**Exhibit 6**).

We start therefore by clarifying what training has to achieve to be useful.

5.1.2 The purpose of training is to help people to solve problems or to develop their capabilities. We have deliberately defined management training very broadly. It can cover anything from reading a booklet to taking a full-time certificated course, and can be provided, or delivered, in many ways, for example through **information, advice, technical aid, consultancy** or **courses (Exhibit 12)**. There may be several people on a project who might benefit from management training or support, but we are primarily concerned with those who

are, or think they are, running the project, and this includes the management or steering committee, however constituted, as well as the project manager.

5.1.3 Management training can help to do three things. It can help clarify what should be done. It can show how to do it, and it can help to improve management skills. The way in which it is provided, and the fact that it leads to perceived success, can also help improve the confidence and the motivation of those involved in the project. The types of support or training that are required will largely be determined by the nature, complexity and stage of development of the project, as well as, of course, by the experience and knowledge of the managers concerned. However, no matter what the project, help will only be beneficial if it is:

— relevant
— timely
— accessible
— acceptable.

In this context relevant means that it accurately meets the needs of the particular beneficiary. Timely and accessible mean that the beneficiary can actually obtain the support at the right time and in the right manner. Acceptable means that the beneficiary must trust the source of support.

5.1.4 Actually obtaining suitable help at the time that it is needed depends on a number of factors:

— knowing that help would be relevant

— knowing what help is available, in what forms and on what basis

— being able to connect with the help in terms of meeting the cost, finding the time and, if necessary, physically getting there.

Thus, not only does 'training' take time away from 'doing', it also requires skill and effort to organise. One of the important decisions that a manager has to make is to decide how much time to set aside for finding the right information and support. The cry for help described in Chapter 2 shows either that many managers are not getting this balance right, or that the right kinds of support are not available.

Exhibit 12   Training can be Delivered in Many Ways

INFORMATION

Sources	Examples
Circulars/Profiles of Initiatives	LEDIS: Local Economic Development Information Service (Planning Exchange)
Information Sheets/ Leaflets	At Work In The Community (NFCO)
Guides	Development: A Guide For Small Housing Associations (NFHA)
Manuals	FRED: Financial Resources for Economic Development (CIPFA/ INLOGOV/Planning Exchange)
Newsletters	Inner City Network (NCVO Urban Unit)
Journals	Initiatives (CEI)
Kits	Model Constitutions (Community Networks)
Action Packs	Education For Neighbourhood Change (Tony Gibson)
Reports	Ethnic Minorities and the Urban Programme (DoE)
Handbooks	Getting Organised (NCVO)
Books	Charities in Britain (David Gerard)
Directories	A Guide to the Major Grant Making Trusts (Directory of Social Change)
Databanks	TAP: Training Access Points (MSC)
Videos/Cassettes	A Survival Guide to Volunteer Organising (Connexions)
Case Studies	Insights into Black Self-Help (CRE)

ADVICE

Sources	Examples
National Support Units	National Federation of City Farms
Local Development Agencies	Birmingham CVS, Bolton Area Resource Centre
Associations	National Managed Workspace Association
Resource Centres	BTCV, ARC, Settlements
Local Authorities	Nottingham City Council Development Officers

TECHNICAL AID

Sources	Examples
Professional Bodies	Chartered Surveyors Voluntary Service
Local Authorities	Southwark Development
Community Technical Aid Centres	Community Design Service (Cardiff)
	Newcastle Architecture Workshop, Freeform Arts Trust, CTAC Manchester

COURSES

Sources	Examples
Workshops	Gateshead Voluntary Organisations Council
Short Courses	Community Entrepreneurs (S.W. London College)
Seminars	SAUS, INLOGOV
Conferences	ACTAC Annual Conference
Action Learning	Manchester Self-Help Evaluation Network, Grants Officers AL Set (GLES)
Professional Degree/ Qualifications	Post Experience for Surveyors (RICS), MA in Employment and Planning (Middlesex Polytechnic)
Distance Learning	Economic Development (LGTB), Continuing Professional Development (RTPI)
In-house Courses	NACRO, Age Concern

CONSULTANCY

Sources	Examples
Student Projects	Lanchester Polytechnic
Management Units	LGTB, NCVO, Industrial Society
Secondments	Action Resource Centre
Temporary Help	MSC Management Extension Programme
Specialist Consultants	Hackney Community Accountancy Project
Professional Institutes	British Institute of Management, CIPFA Services

5.2 What Support is Available"?"

5.2.1 In the course of this study we came across almost 1,000 organisations in England which provide training or support that could be relevant for people managing projects in inner cities. Of these, over 300 give regular courses. They range from large national or regional organisations to small local ones. Some deal principally with local authorities; others focus on the voluntary sector. **Exhibit 13** illustrates this range and the types of provision.

5.2.2 In the past there has been a tendency to think of training solely in terms of courses. Indeed much of the

provision is still in this form, as it is one of the easiest and most cost effective ways of organising it. However this attitude is now starting to break down, and much of the growth in training is in the other delivery methods. Also while technical training and management training have traditionally been provided separately, many providers are now aiming to cover both. In general, management training is growing rapidly in both the local authority and voluntary sectors, despite the fact that there has been some resistance to the notion of "management" in the voluntary sector.

5.2.3 There is no training aimed solely at Urban Programme project managers, although there is limited

Exhibit 13 Some Training And Support Organisations

ORGANISATIONAL TYPES	CLIENTS SERVED			
	Mainly Local Authority		*Mainly Voluntary Sector*	
Educational Establishment	National:	SAUS. INLOGOV.	National:	Brunel. Education for Neighbourhood Change.
	Local:	Huddersfield Polytechnic.	Local:	Camden Adult Educ. Inst. Northern College.
Members Providing Services	National:	RTPI. LGTB.	National:	ACTAC. BASSAC.
	Local:	n.a.	Local:	Local members of ACTAC. Greater Manchester Community Work Training Group.
Membership Organisation	National:	IEDO. CLES.	National:	NFCO. NFSHO.
	Local:	Provincial Councils. Local RTPI branches.	Local:	North Tyneside Federation of Community Organisations. Hackney Community Action.
Privately Run	National:	Henley management school. URBED.	National:	Industrial Society. Regional Training Initiatives.
	Local:	Local Management Consultants.	Local:	Network.
Subsidised Trainer	National:	Educational Establishments.	National:	NCVO. Volunteer Centre.
	Local:	Most local authorities' own trainers. Provincial Councils.	Local:	ADVANCE. Sunderland Community Work Training Group.
Internal Trainer	National:	n.a.	National:	Age Concern. NACRO.
	Local:	L.B. Wandsworth. Bradford M.B.C.	Local:	Stonebridge Project, Brent. Feltham Community Assoc.
Information Provision	National:	Urbaline. Planning Exchange.	National:	VORTEX. Charities Aid Foundation.
	Local:	Every local authority.	Local:	LCVS Training Unit. W. Yorks Charity Information Bureau.

training available for UP Co-ordinators in local authorities. For example,

— Aston University has developed computer software to assist a local authority in developing and monitoring its UP programme.

For the most part, **management education and training** is geared to a wider scene, including of course the private sector, and on the whole project managers must link into what is available in their area. The overall range of provision is enormous, from degrees and diplomas to magazine articles, although much of it is informal or in the form of on-the-job coaching. (For an up-to-date survey, see *The Making of British Managers*, published by the British Institute of Managers and the Confedera-

tion of British Industry). Except in the construction and engineering industries and for the related professions there is little direct training in **project management**, but as has been shown in this report it is not classical project management skills that are usually required in running urban change projects. Also there is little formal training in **urban change** or **urban regeneration**, reflecting perhaps that this has only recently become a key concern. However Leeds Polytechnic, for example, runs undergraduate courses in urban development.

5.2.4 Most of the training organisations focus on one sector only, as each is thought to have its own particular requirements. There are some organisations that aim to cover more than one, and comments from our surveys

show that project managers appreciate the opportunity of learning from others running projects in different settings. For example,

— Bradford City Council has opened up its training courses to people on short term contracts and to those in voluntary organisations, which has been generally welcomed

– The action learning sets run as part of this project, brought together local authority officers and voluntary sector project managers, and both sides found this type of contact very helpful.

Nevertheless, it is still most useful to describe the training and support that is available for local authority and voluntary sector projects separately.

5.3 Support for Local Authority Projects

5.3.1 A great deal of management training and support is available in local authorities, but it mostly addresses the general management needs of the authority. Practically every local authority has a Training Unit, and many have departmental budgets. But there are substantial differences in resources and attitudes between different authorities, some just acting as clearing houses for information (e.g. London Borough of Brent, Leicester City Council), others providing the majority of training within the authority (e.g. Sheffield City Council, Bradford City Council). In-house management training is generally geared towards the running of departments, not the running of projects, and although there is a degree of overlap, the amount of specialised project training is very limited. However certain departments concerned with projects do have their own budgets and can organise their own relevant training (e.g. Wandsworth Economic Development Office, Hammersmith and Fulham Economic Development Unit).

5.3.2 Besides the individual authorities there are twelve provincial councils, organised regionally, that can provide management training to the local authorities in their areas. They can tailor courses to suit a particular authority's needs, but again the emphasis is on general management skills not on specific project management skills. The Local Government Training Board (LGTB) is the overall body co-ordinating the identification of training needs, and certain authorities have very close links with it. It is now starting to address the needs of project managers. It has recently developed a distance learning package for Economic Development Officers, and is starting to look at the management issues of the interface between the business, voluntary and local authority sectors. It is also the main source of information for local authorities on new initiatives and management training generally.

5.3.3 Most local authorities also use local colleges, polytechnics and universities to provide management training, and there are some polytechnics which are now addressing the special needs of project managers. For example, Leicester, Lanchester and Middlesex Polytechnics run certificated courses in economic development, and Leicester provides management courses for technical officers. The leading providers of short courses for local authorities are the Institute of Local Government Studies (INLOGOV), the School for Advanced Urban Studies (SAUS), Aston University and Leicester Polytechnic. They provide some management courses which are very relevant to urban change:

— INLOGOV's primary focus is on education for senior officers, and includes courses on the management of change

— SAUS runs short courses for councillors and all levels of officers, including for example one on "making things happen" which focusses on the implementation of policies and projects.

5.3.4 These organisations also undertake consultancy assignments, and external consultants often help to inject specialised management skills and techniques. For example,

— St. Helen's Metropolitan Borough Council used outside consultants to develop a project management system for environmental projects

— Birmingham's Economic Development Unit used consultants to design software to help with the planning of projects.

There are also a number of specialised training providers which run courses and provide **technical assistance** and **information** which might be relevant to the management of specific projects. These include Planning and Transport Research and Computation (PTRC), the Institute of Advanced Architectural Studies (IAAS) and the Centre for Environmental Interpretation (CEI), based at Manchester Polytechnic. The Institute of Housing now trains local authority staff and tenants' associations as well as its own members in all areas of housing management and publishes booklets as well as providing advice.

5.3.5 In addition, a wide range of **continuing professional development** (CPD) courses are available. These are mostly based on distance learning, or correspondence courses, and are often developed by the professional institutes. For example,

— The Royal Town Planning Institute (RTPI) already has several distance learning courses and is developing two more per year, some of which will be geared towards urban change

— The Royal Institute of British Architects (RIBA) has plans for 320 distance learning packs.

Updatable handbooks and information services are an extension of the CPD concept, and there are several

which are targeted towards local authority officers. These can not only provide current facts but also help to disseminate information on good practices and new developments. As yet there is no comprehensive handbook on project management, but there are very useful information services to which most, if not all, local authorities have access, such as Financial Resources for Economic Development (FRED) or Local Economic Development Information Service (LEDIS).

5.3.6 Thus training is already well established in local authorities, although much of it is geared towards professional qualification rather than helping project managers in post, and those running projects find that they must principally learn about it on the job. Within local authorities, however, a band of people who have had experience of running urban change projects is beginning to emerge. They already exchange information wherever they meet (at conferences, on professional training courses and so on) and in time they could develop into a valuable source of support to others starting to run projects in their own authorities.

5.4 Support for Voluntary Sector Projects

5.4.1 The need for management skills in the voluntary sector is just as great as it is in local authorities, but management and management training are still seen by many as something alien which is being forcibly grafted on. There are, however, some organisations that are already alive to the benefits of good training, and throughout the voluntary sector there is an increasing, if unfocussed, demand from those responsible for running projects for more support. Consequently the number of training providers in this sector is increasing. They have to organise themselves to provide services to individuals and organisations which have limited funds and are probably only funded for limited periods of time. Furthermore, working in the voluntary sector is very different from working in a local authority. There is little career structure in the voluntary sector and academic qualifications are not seen as very relevant. Attitudes towards training, especially formal courses, which bring back memories of school, can be distinctly negative, and, as was emphasised to us in several of the case studies, there is also a feeling in the voluntary sector that training should be about community development and so everybody should benefit from it, not just those with special skills and responsibilities.

5.4.2 Unlike the public sector, the voluntary sector consists mainly of a very large number of small organisations doing very different things. Training for the voluntary sector therefore takes many forms. The level of provision varies greatly across the country and, so we were told, does its quality. There are a few national bodies with regional offices that provide management courses and consultancy throughout the country, and individuals can always join courses run by

local polytechnics and colleges. However, the main support for voluntary organisations is supplied by what are now starting to be called **local development agencies** (LDAs). This is a recent term which covers several different types of bodies (such as Local Councils for Voluntary Service, Community Relations Councils, Volunteer Bureaux, Resource Centres and Settlements) which support front-line voluntary organisations. There are over 700 LDAs in Britain, but only the term is new. The individual agencies have each been operating in their own way for some time and naturally have most in common with other members of their own networks. Nevertheless the various LDAs in an area do have interests in common, too. A prime concern of all of them is to promote the development of relevant voluntary groups in their locality and they often act as advocates for them, especially in relations with local authority. Taken together they go some way towards representing the voluntary sector in an area, although there will be voluntary organisations which do not feel that they fit under any part of this umbrella.

5.4.3 Local Councils for Voluntary Service (CVSs) are one of the main constituents of the LDAs. With a few temporary exceptions there is a CVS in every inner city district, and one of their long established aims is to support local voluntary organisations. Nationally they are supported by a National Association (CVS NA), but each CVS is an independent body, and individually they have very different levels of resources and expertise. Some, as in Birmingham and Newcastle, have a designated Urban Programme Officer who liaises with the local authority as well as advising projects. Some, as in Manchester, Leicester and St. Helens, organise training programmes of their own, while others provide a local base from which the National Council for Voluntary Organisations (NCVO) can run its management courses and seminars, which form one of the most comprehensive programmes of training available to the voluntary sector. All CVSs provide information, and some, as in Leicester, Nottingham and Birmingham, produce information packs for the newer community groups, although many are more geared to the needs of traditional voluntary agencies. It must also be stressed that CVSs only have limited resources. Indeed they are often competing for the same scarce funding as the organisations they support.

5.4.4 In addition to the LDAs there are several national organisations that can provide management support. NCVO set up a Management Development Unit specifically to introduce management concepts to voluntary organisations. This unit has now been divided so that work at the national level is undertaken by a National Organisation for Management unit and local work is carried out by a Local Voluntary Action department. However, much of the unit's training and consultancy services are still available. The National Federation of Community Organisations (NFCO) and the Industrial Society's Voluntary Organisations Unit

also provide management training. The latter runs a large selection of courses, dealing mainly with people management and motivation, and carries out consultancy assignments. There are also a number of specialised agencies, such as Community Technical Aid Centres which can assist those undertaking complex capital projects, and the British Trust for Conservation Volunteers (BTCV) which specialises in conservation projects. There are even a small number of community accountancy projects which provide tuition on finance and back-up services in accountancy.

5.4.5 There are a growing number of bodies dealing specifically with racial minority groups. There is now a national network of Community Relations Councils (CRCs) supported by the national Commission for Racial Equality (CRE). The Commission runs management courses for the projects it funds and for CRCs. The CRCs provide assistance to local groups, helping them to set up projects as well as to run them. However they have many other responsibilities in trying to promote equal opportunities in all aspects of life. Other organisations have started initiatives particularly to support projects. The NCVO's Organisation Development Unit for Ethnic Minorities now provides support in six main cities. The Community Roots Trust runs training courses for black organisations which include fund-raising and management skills; it has also developed a Certificate in Management Studies. The National Federation of Self Help Organisations (NFSHO) also provides advice and support to community groups. There are a few local initiatives, such as Afro-Asian Management, Financial and Community Training (AAMFACT) in Leicester, which are specifically aimed at developing the management skills of local minority groups.

5.4.6 In some areas, such as Sunderland, Bradford and Manchester, local community training schemes have been established which do incidentally also provide management training for staff and management committee members of voluntary organisations, and more and more local authorities are taking active steps to help, as well as just fund, voluntary organisations. Link officers are being employed, information packs are being produced, and contact officers who can give specialist advice are being designated. But it must be remembered that local authorities in inner cities face severe financial constraints, and find it hard to provide resources to support the voluntary sector adequately.

5.4.7 A few large companies are starting to provide subsidised training courses for voluntary organisations. For example, IBM's Community Affairs Department runs a residential Creative Management Skills course to develop personal and leadership skills, although its main emphasis has been towards the traditional voluntary agencies. Smaller voluntary organisations are often able to obtain advice and information through members of their management committees, and some deliberately

seek out experienced managers from the public and private sectors to strengthen their projects in this way.

5.4.8 In summary, there are a great many potential sources of training and support for the voluntary sector, but while some may provide excellent services others may not have the required resources or expertise. For the inexperienced project manager the situation is rather confusing.

5.5 What Help is Found Valuable?

5.5.1 While there is a general demand for more support for project managers, our initial survey provided information on what types of support are considered most appropriate at different stages of a project, and our interviews, workshops and case studies highlighted certain aspects that are considered particularly valuable. Nearly everybody felt that any form of help might at least be of some value at any stage, but:

— 61% of respondents felt that top priority should be given to support in the **early stages**, and

— **advice** (71%) and **information** (59%) were described as very useful in these early stages, whereas

— **courses** (52%) were felt to be most useful for established organisations.

5.5.2 **Advice.** This is clearly one of the most valued and efficient ways of obtaining help to cope with a specific problem. It is contact with others who share similar experiences that is really valued

— "I learn most by talking to colleagues and other workers in the field."

— "In my experience in this and my previous job, I feel that the most beneficial form of training lies not in received wisdom or information or the acquisition of particular skills, but in opportunities to share and exchange information with others involved in the Urban Programme."

— "I have learnt a lot whilst being in the job. Most of this learning comes through discussion and working through ideas with other people."

— "We have found that the best form of help is being able to talk to similar projects, through exchange visits."

5.5.3 **Information.** There is a great awareness of the value of relevant information. Guidelines, directories and newsletters are the main forms that are found valuable

— "Nottingham I.A.P. have developed a very good set of guidelines for voluntary organisations."

— "More good practice notes and more information on good case examples from UP areas would be

useful. The Planning Exchange in Glasgow is a good model."

— "The West Yorkshire Charities Information Bureau has a computer facility of all grant making bodies in the area which is really useful."

5.5.4 Courses. As well as being an effective way of learning in the right circumstances, courses can also be beneficial in other ways

— "I went on a NALGO course on how to do layouts and newsletters. As a result we use different coloured paper and our stuff really stands out from other people's in a huge pile."

— "We ran a very successful training course for local organisations and included both workers and management committee members — this both improved skills and networking in the area."

— "The benefit derives as much from making contact with other course participants as from the course content itself."

— "My own belief is that course attendance of the half day variety at local levels can be continually beneficial. In other words these courses represent the continual training needed to keep abreast of events etc."

5.5.5 Technical Aid. Technical aid is valued by groups who recognise that they lack specific skills

— "Groups don't often realise that people like us can go in and help them when they have troubles. When you become a fully-fledged community association in a building and with staff, you have to cope with problems and comply with legislation; how can you expect people with little or no experience of these things to carry on with no help?"

— "The Community Accountancy Project acts as trainers, intermediaries and as providers of a service. Because they are local and confidential, you or your management committee can go to them to discuss problems."

5.5.6 Consultancy. Although seen as expensive at first sight, external consultants can be very valuable as they come without prejudices and are able to focus on an organisation's specific problems, whereas courses necessarily cover more general issues

— "The role of the external trainer-consultant is vital as they have no axe to grind. We have used one successfully."

— "My management committee will listen to an outsider, but not to me."

— "Racism awareness is best done in a working environment with an outside consultant and more objective feedback."

5.6 Why Opportunites are not Taken Up?

5.6.1 If so much help is available and valued, why is it that 70% of project managers surveyed felt that their organisations were paying insufficient attention to management training? The main reasons given were:

— lack of funds   (31%)
— lack of time   (26%)
— lack of relevance   (25%)
— low priority of training (18%).

5.6.2 Lack of Funds. Formal training costs money. If it is too expensive, or if adequate provision has not been made for it in the budget, then it cannot be taken up. Both voluntary organisations and local authorities faced this problem

— "£160 for a residential course is a lot of money for a small project to find, particularly when staff change frequently."

— "There are very few internal courses run by the local authority and the total training budget for a department of 50 people is only £1,000."

5.6.3 Lack of Time. Just as it is easy to allow activity to crowd out many aspects of management, so it can crowd out training. But in the end this is a matter of priorities

— "My authority will allow you to take courses in your own time, but you have to use flexi-leave and this precludes whole day release."

— "Overwork and the importance of day-to-day running of the organisation takes over."

— "Project staff do not have any time to go and get trained."

5.6.4 Lack of Relevance. Much of the training that is available is in the form of courses, but this is not the most relevant type of management support during the early stages of a project, and if training is not perceived as relevant it will not be taken up

— "Training is not tailored to our needs. I tend to find 'management' courses a bit too theoretical."

— "Training opportunities are often not as successful as they could be because courses are inappropriate."

5.6.5 Low Priority on Training. Although most people who control resources pay lip service to the value of training, in practice it is often given low priority:

— "Although a training officer has been appointed, training is still perceived by the majority of local agency management as being separate from, and less valuable than 'work'."

— "My management council see staff training as a waste of time."

— "The committee at the Council aren't sympathetic to our training needs. They think that as we have been hired to do the job we don't need training."

5.6.6 Other Reasons. From our contacts with voluntary sector project managers we also heard other reasons why training opportunities were not always taken up. One reason concerned location. While our analysis showed that basic training was available in every major urban region, there is no doubt that London is best supplied and that there is comparatively less management training available in the North, the North East and the North West, although these regions are well supplied with technical aid agencies. In some regions, therefore, it can be difficult to find precisely the right type of management support locally. It is almost certainly there, but it may take some finding and it may be in relatively short supply. Indeed difficulties in finding out about things was a problem which we continually came across — in all parts of the country. Not only did project managers not know about other initiatives quite close by, but they often did not know about what support was available or how to go about looking for it.

5.7 The Importance of Networks

5.7.1 The main conclusion from this study about the types of training that are most useful is that it is **learning from experience**, either on the job or from others, that is most valuable to project managers and can help most of them cope with the problems they encounter. What is important is to be able to obtain information and advice at the time it is needed, and as no single source can provide advice based on experience on every issue, it is necessary to have a range of contacts to draw on. Successful project managers pay tribute to the advice they get through their networks of contacts

> — "Networks are a very useful resource — whether formal or informal they can be used for obtaining management committee members, getting allies and obtaining training etc. They are built up with experience and time."

> — "Working through issues with people in the same network is often more useful than going on courses."

> — "We have 8 voluntary organisations in our building, the area is a voluntary sector ghetto, so we all know what's going on."

> — "A key element in the Groundwork approach is the idea of a kind of family, or federation of trusts who help each other out, and meet both formally and informally."

> — "There are bi-monthly regional meetings attended by some 20 NACRO people involved in crime prevention, for a whole day. The main purpose is to share information, pass on ideas, and provide support and training. They are very reassuring and you can get some lovely ideas."

5.7.2 Networks are linkages of trusted people from whom or through whom information, advice and ideas can be exchanged. Networking is a way of working with and through contacts rather than just through a formal organisation. People, as individuals, gradually assemble personal networks according to their particular interests. In networking, the contacts are person-to-person rather than organisation-to-organisation, because it is primarily at the personal level that trust and reciprocal benefit can exist. However, building a personal network, certainly at the early stages, relies heavily on getting to know people through more formal structures, for example through meetings, training events, seminars and conferences. These initial contacts in turn become the less formal growth points for extending the network. This takes place by asking the contacts about other people who they think might be worth consulting in the light of some particular interest or concern. Face-to-face meetings are not always required. Networks of telephone contacts, sometimes going through several links, can be fast and effective.

5.7.3 Networks can be formal or informal, and formal networks can operate through a membership system. For example, members of the Industrial Society's Voluntary Sector Unit have the use of an extensive library, have direct access to two barristers by telephone, receive regular mailings of a newsletter, and can obtain discounts on training courses. Less formal is the skills exchange network run by Birmingham Voluntary Service Council which brings community organisations together

> — "We encourage groups to recognise the abilities they have and to share them with others, drawing also on our knowledge, and the wide expertise of people from the voluntary sector, the Council, the academic world and commerce."

Informal networks depend on who the individual project managers know and get to know. In large organisations, such as local authorities, much support can come through the formal structure. However there is often great value in building informal networks that include key people in other departments, as well of course as in making contacts outside. Indeed modern books on the management of large organisations, such as *In Search of Excellence* by Peters and Waterman, are now stressing the importance of fostering informal linkages and entrepreneurial skills across the organisation.

5.7.4 As well as being a source of information, a network can also be used to develop the project manager's own thinking about the project. For example, explaining a project to a concerned stranger can help to sort out priorities and to regain a feeling for the special character of the project. Thus the establishment of a relevant network in the early stages of a project and its subsequent development can give the project manager rapid access to types of **information and advice** which are needed, and thus go a long way towards overcoming the difficulties of providing training for entrepreneurial managers.

5.7.5 The skills of effective networking are basically no different from those required in other communication aspects of a manager's job. In particular, sensitivity to the needs and interests of others is important. Networking is a two-way process. It is important to give as well as to take, and to listen as well as talk. As projects go through different stages and the problems encountered tend to vary from stage to stage, the network may have to change as the project proceeds. However, it is at the start that an inexperienced project manager will feel most in need of support and will have least idea of how and where to look for it.

5.8 Conclusion: Where are the Gaps?

5.8.1 Our research has shown that a great deal of management training is available, but that the great majority of project managers and others connected with urban change projects do not think that the current provision is adequate. We have found four main reasons for this.

5.8.2 First, there is a basic mismatch between what is being provided and what is required. The suppliers are primarily supplying specific courses whereas project managers are not sure what they actually need, especially in the early stages of a project, and want information and advice from someone with experience of a situation similar to their own. Sometimes a course will be a good way of providing this, but often it will not. Entrepreneurial skills, which we have identified as of key importance, are not easy to learn through conventional courses.

5.8.3 Secondly, inexperienced project managers do not know how to find the relevant information and advice they need.

5.8.4 Thirdly, there are considerable differences in the availability and quality of different kinds of support in different areas. Local authorities, local development agencies and specialist organisations each can and do provide valuable help, but there are wide variations in their resources and expertise in different localities, and there is no way of knowing if there is at least a satisfactory minimum standard of provision in all areas.

5.8.5 Fourthly, in both local authorities and voluntary organisations there is usually insufficient time and money set aside for training and support. In the voluntary sector, 'training' often receives low priority compared to 'doing', and while training is taken much more seriously in local authorities it is geared to professional development rather than project management.

Chapter 6   Filling The Gaps

Inexperienced project managers need relevant and timely support, based if possible on practical experience. There is now a great deal of experience and expertise around on urban change projects. Successful project managers have not only developed their own management skills on the job, but they have usually also built up their own networks for obtaining information and advice, and thus — if in other people's eyes — know 'how to get round the system'. It is therefore important to look both at the mechanisms for helping project managers identify their needs and gain access to relevant support and at the individual pieces of help that are still missing. This chapter, therefore, starts by describing what would constitute a basic minimum 'support system' for inexperienced project managers and then looks at the types of training or support which still need to be provided.

6.1 Project Management Support System

6.1.1 Projects encounter both general management problems and problems specifically related to the type of project being undertaken. An inexperienced project manager will therefore usually need two types of support:

— A **local generalist** source of information and management advice (e.g. link officer, LDA)

— A distant, possibly **national**, source of **specialist** knowledge on the particular kind of project being undertaken, or subject area (e.g. national federation, such as the National Managed Workspace Group).

If these two sources were available to all new project managers, not only would they have access to the types of information, advice and support that they most need, but also they would have good channels through which to begin to build up their own personal networks to suit their particular projects. As time passes the personal network plus these two main contacts would become a resource through which specific needs are recognised and ways of meeting those needs are found.

6.1.2 The **local generalist** would be the first source of help on a wide range of management matters and, rather like a medical GP, must be respected, trustworthy and sufficiently knowledgeable to provide rapid access to relevant information and advice. The **national specialist** would enable the project manager to obtain specialised information or skills related to a particular kind of project, or a particular kind of problem.

6.1.3 Together, these two kinds of contact points — the local generalists and the national specialists — would form the basis of a **Project Management Support System (Exhibit 14)**, and there are other features, which would make the system more effective, which could be incorporated:

— mechanisms for providing mutual learning amongst the local generalists and for keeping their knowledge up-to-date

— mechanisms for enabling experienced project managers to move into positions where their experience can be used effectively (which would also foster career development)

— mechanisms for feeding back successful project experience to new and prospective project managers and to the advisers.
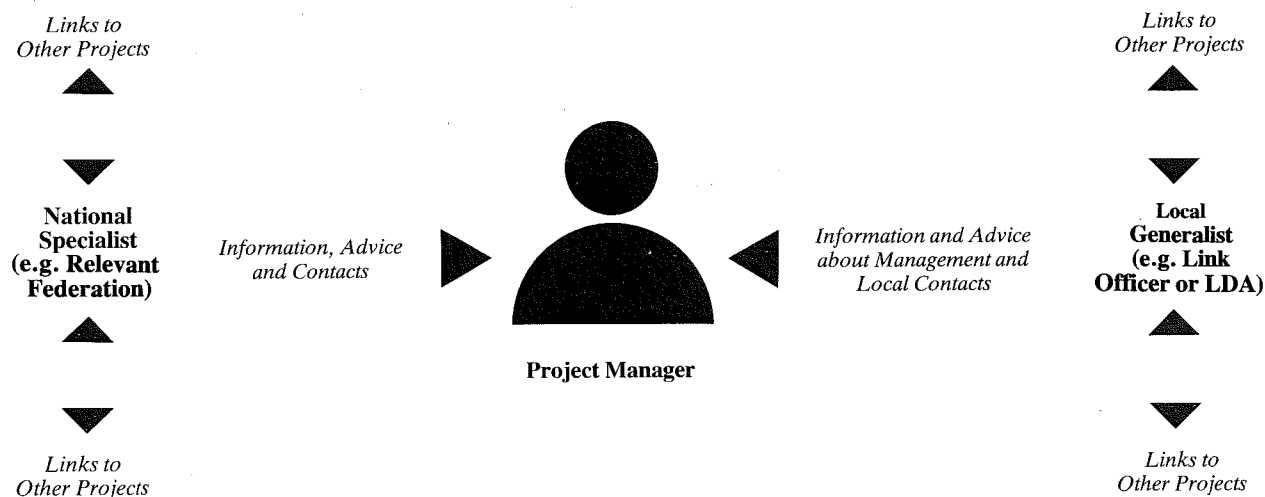
6.1.4 A system like this could be built up in many ways. In some cases the local generalist might be a link officer or an individual in the local CVS, but this could vary from project to project and from area to area depending upon the skills of the people available. The national specialist contact point might well be someone in a federation, but again this might not always be so. An inventory of suitable national specialists could be built up, based perhaps on the main UP project category headings which the DoE has developed (**Exhibit 15**).

6.1.5 Once the need for these two kinds of support is accepted it will be possible to start identifying the specific contacts, and organising a support system covering all the main urban areas in the country. Most of the contacts will already be in place. Chapter 5 described the rich variety of organisations that are already providing support to local authority and voluntary sector project managers. The case studies show that relevant networks can be built up by experienced project managers. What already exists could be built on so that each inexperienced project manager could be sure of having access to two basic support networks. All that is really required is a measure of formalisation. For example,

— The Project Management Support System, and how to use it, must be explained to all new project managers

Exhibit 14   The Project Management Support System

INEXPERIENCED PROJECT MANAGERS WILL USUALLY NEED TWO TYPES OF SUPPORT

Links to Other Projects

Links to Other Projects

National Specialist (e.g. Relevant Federation)

Information, Advice and Contacts

Information and Advice about Management and Local Contacts

Local Generalist (e.g. Link Officer or LDA)

Project Manager

Links to Other Projects

Links to Other Projects

— Project managers must be automatically introduced to two appropriate contact points

— Contact points must be supplied with adequate information so that they know how to put project managers in touch with relevant help

— There must be an adequate number of local generalists in each area and each must be competent for the role.

Only the last of these might be difficult to organise, and appropriate local solutions will have to be found. This will require the public and voluntary sectors to work together to ensure that basic networks can be built up so that inexperienced project managers no longer feel left out in the cold.

6.2 Filling Specific Gaps

6.2.1 An organised Project Management Support System would in itself help to fill some of the gaps identified in Chapter 5. In particular, the need for **advice** should be largely satisfied, and the difficulty of finding **relevant information** at the right time should be eased. Also the problem of lack of time for training may, to some extent, be overcome. With more emphasis on obtaining advice, which can usually be fitted in with

other duties, rather than going on courses, training may appear to demand less time, and certainly less time away from the job. However our surveys also revealed concerns about specific aspects of training which need to be addressed. The main issues are:

— **Budgets for Training**

— **Information for Organising a Project**

— **Basic Administrative Skills**

— **Communicating and Negotiating Skills**

— **Training for Management Committees**

— **Training in Building Development.**

6.3 Budgets for Training

6.3.1 There will always be some limit to the total amount of public funding available for urban change programmes such as UP, and so there will always be pressure on project budgets. However this report argues that certain types of expenditure, including expenditure on management training, are vital to the health of the project and that to fail to allow for them is a false economy. Yet we have repeatedly found that training budgets are either inadequate or non-existent.

Exhibit 15 Examples of National Sources of Information and Advice

ECONOMIC PROJECTS

Project Category	*Example*
Provision of starter/enterprise units	National Managed Workspace Group, Liverpool
Street improvements and traffic management schemes	Civic Trust, London
Training projects and initiatives to help the unemployed	Community Projects Foundation, London
	Project Fullemploy, London
Business advice and promotion	Business in the Community, London
Other economic assistance	Centre for Employment Initiatives, London

ENVIRONMENTAL PROJECTS

Project Category	*Example*
Landscaping of vacant and derelict land	Association of Community Technical Aid Centres, Liverpool
Improvements to parks and open spaces	Association of Community Technical Aid Centres, Liverpool
Facelift schemes	Civic Trust, London
Environmental improvement schemes outside IIAs and CIAs	Groundwork Foundation, Birmingham
Other environmental schemes, including conservation projects, anti-litter campaigns, local amenity trusts and voluntary sector initiatives	Town and Country Planning Association, London
	National Federation of City Farms, Bristol
	UK 2000, London

HOUSING PROJECTS

Project Category	*Example*
Environmental improvements in problem council estates	Association of Community Technical Aid Centres, Liverpool
Housing management improvement schemes	National Federation of Housing Associations, London
Environmental improvements in HAAs and GIAs	Association of Community Technical Aid Centres, Liverpool
Provision of hostels and refuges	Shelter, London
Support for tenants organisations	National Tenants' Organisation, Brentford
	National Federation of Community Organisations, London
Other housing projects	Federation of Independent Advice Centres, London

SOCIAL PROJECTS

Project Category	*Example*
Ethnic Minorities	Commission for Racial Equality, London
Youth Activity	National Association for the Care and Resettlement of Offenders, London
	National Youth Bureau, Leicester
Self help for socially disadvantaged families	British Association of Settlement and Social Action Centres, London
Self help for socially disadvantaged individuals	National Women's Aid Federation, London
Community care for the disabled	The Disabled Living Foundation, London
Primary and community health care	Association of Community Health Councils, London
Educational facilities for disadvantaged pupils	Pre-school Playgroups Associations, London
After-school activities for children and young people	National Youth Bureau, Leicester
Sports/recreation projects	National Playing Fields Association, London
Play projects	Fair Play for Children, London

6.3.2 It is now being realised that, in general

— "management training in Britain is too little, too late, for too few". Reliance on "a Darwinian belief that the fittest will survive . . . is a wasteful process." "Management makes a difference and it can be developed". (*The Making of Managers* by Charles Handy).

While attention has been focussed mainly on the private sector and on industry, exactly the same arguments apply to the other sectors and to urban change. Indeed, since urban change projects require and develop entrepreneurial skills, and make a point of feeding them back into local communities, management training in this field should have as high a priority as any.

6.3.3 *The Making of Managers* reports that leading companies in the major economies aim to provide about 5 days training per year for their managers. As the types of training that we have found most effective are quite ordinary (e.g. visits to other projects) the cost of a similar amount of training for a project manager would only be in region of £250–£500 per year. Across the whole of UP this would amount to 1%–2% of the total programme.

6.3.4 Budgets for training need to be built in right from the start, and the principal funding agencies should take responsibility, as a standard part of their approval processes, for ensuring that adequate amounts have been budgeted for the management of the project including management training, just in the same way as they would see to it that adequate professional fees were allowed for on a capital project. With mixed funding there is obviously a temptation for one funding body to try to pass the responsibility on to another. This would be avoided if **all major funders** — not just the public sector — **were to endorse the importance of management training for project managers** and agree to contribute to it pro rata on all projects they support. In some cases it may not be easy to forecast precise training needs at the start of a project. It might therefore be necessary to consider establishing an area fund to which approved projects could subsequently apply for money for training when the needs had been clearly defined.

6.4 Information for Organising a Project

6.4.1 In many areas those running voluntary sector projects, or trying to formulate them, lack basic data on:

— **Planning and organising a project**

— **Sources of funding**

— **How local authority and other funding systems work**

— **Other projects and initiatives**

— **Availability of training**

— **Obtaining information.**

In most cases the information does, of course, exist, but it may not be easy to find, and many small groups are unaware of what is available or why it might be important.

6.4.2 **Planning and Organising a Project.** There is a great deal of information which would be helpful to those planning and organising projects, but it is not all brought together. Some local authorities have appointed link officers or development officers, one of whose roles is to help groups organise projects. They can be very useful. Some CVSs do provide comprehensive information packs. We have proposed the publication of a basic Project Management Handbook which would bring together not only information on the key problems that projects encounter, including project planning, but also contain other updatable information on how to apply for UP funding, where to find help, how to fill in monitoring returns, and so on.

6.4.3 **Sources of Funding.** There are many different sources of funds that might be tapped for urban change projects, but it is not always easy to find out which are most interested in what types of project and what their criteria are. The Directory of Social Change publishes a *Guide to the Major Grant Making Trusts*, but only about 30 out of the 200 trusts included publish any statement of policy or guidelines for applicants. Even knowing their timetables for dealing with applications would be helpful.

6.4.4 Although there are a number of sources of information on funding, especially the Directory of Social Change and the Charities Aid Foundation, those preparing proposals may need help in finding and using this information to their best advantage. Furthermore, printed directories rapidly become out of date, and a computer-based service would seem to be required. The West Yorkshire Charities Information Bureau, which has information on some 1800 funding sources, provides a potential model.

6.4.5 **How local authority and other funding systems work.** Our research indicated that small voluntary organisations are often mystified about how their local authority works and how and why decisions are made. This contributes to the frustration that both voluntary groups and local authorities so often feel in their dealings with each other, and creates unnecessary inefficiency. Some local authorities, for example Leicester and Haringey, have already introduced courses in 'Civics' to explain the mechanisms and realities of central and local government. Some CVSs and training organisations provide courses and advice on this subject and several also include some information on it in their publications. If such courses were widely run, communication between the voluntary sector and government should be greatly improved, and we think that ethnic minority groups would find them particularly helpful. However, we also think that a far wider range of people than just those undertaking projects would benefit from understanding how government works and that 'Civics' courses might best be included in the general adult education system, and perhaps even covered at school.

6.4.6 Obviously 'Civics' courses would not be compulsory, but it is important to ensure that each project has at least a minimum amount of information about 'how the system works'. This could be achieved if each local authority organised **Awareness Days** or one-day sessions to bring new project managers together, as soon as their projects have been approved, in order to ensure that they really understand how their grant regime works, what is expected of them, what problems they are most likely to encounter, how to interface with the local authority, why monitoring is vital and how to find help. Such Awareness Days could also provide an opportunity for the various local organisations that can assist projects to introduce themselves, and for project managers (of both local authority and voluntary sector projects) to meet each other, thus starting the vital process of building networks. Linkages could be further improved if the local authority and relevant local organisations jointly organised these days.

6.4.7 **Other Projects and Initiatives.** It has already been emphasised that project managers wish to learn from

and about the experiences of others. Advisers, evaluators and decision makers also need to be aware of the state of the art. Not only should those involved in various aspects of urban change be encouraged to **visit** successful projects, but guides to good practice, case studies and practical management tip sheets should all be encouraged and made widely available. This is a cheap and effective way of providing training. The DoE is already taking the lead in publishing **guides to good practice**, but a means of ensuring that information is kept up to date and circulated to those who really need it, is also required. The Local Economic Development Information Service (LEDIS) run by the Planning Exchange in Glasgow is an obvious model, but in this case the emphasis would be on management issues and techniques. The format and contents should also be compatible with the proposed Project Management Handbook.

6.4.8 As visits are such a cheap and effective way of training, steps should be taken to encourage them. Projects should be encouraged to hold **open days** on which to encourage visits from other project managers, and particular projects should be designated as **'Demonstration Projects'** to act as relevant models for others to learn from.

6.4.9 **Availability of Training.** While training providers do advertise their courses and other services, we found that project managers often throw away unsolicited information on training, and so only respond to that which is immediately to hand when they need it. It would therefore be useful if up-to-date listings of training opportunities were available. Several CVSs already have training libraries, as do other bodies, and computerised training databases are being developed. For example, the MSC is sponsoring TAP (Training Access Points) which eventually aims to provide national coverage of employment related training. As this database will already include information on many relevant management courses, it might be possible to extend it to cover all forms of management training and support.

6.4.10 Other initiatives illustrate what can be done in this field. For example, TARGET (Thames Action and Resource Group for Education and Training) based in the Thames Valley has data on 400 courses on employment skills training. They not only disseminate this information, but take an active role in identifying gaps in local provision and getting courses established to fill them. If a national database were available local groups could perform these tasks in each area without having to undertake the arduous tasks of collecting and updating information.

6.4.11 **Obtaining information.** The need for information and advice has been repeatedly stressed, but paradoxically if too much information is made available inexperienced project managers may just drown in it. Hence the importance of **informed advice** —

if only to help project managers find out what information they should be paying attention to. A Project Management Support System and an updatable handbook, with which local advisers (as well as project managers) would be familiar and to which they could make their own personal additions, would provide a basis for this. In addition, and partly as a way of keeping the handbook up to date, a regular Urban Change Bulletin could be circulated to project managers, link officers, advisers, management committee members and all those involved in managing UP or supporting the voluntary sector. Besides containing pages which could be inserted directly into the handbook, this bulletin could also contain information about innovative projects, changes in UP and other programmes, personnel changes and so on, in order to keep everyone in touch with what is happening and to stimulate the flow of information through the networks. Job advertisements might be used to cover some of its costs.

6.5 Basic Administrative Skills

6.5.1 Whilst entrepreneurial skills are the key to the successful management of urban change, any organisation or project needs to be adequately administered. A total lack of administration will quickly lead to chaos, and poor administration will lower the efficiency of a project's operations. This does not mean that good administration is synonymous with, or even a proxy for, good project management. Nor does it mean that the project manager must necessarily be a good administrator. But it does mean that the project manager must recognise the value of good administration — and certainly not openly despise it — and must ensure that some capable person in the organisation is paying sufficient attention to it. So if the project manager is weak in administration, at least one member of the staff must be able to fill the gap. This, of course, is likely to be much less of a problem on local authority projects, as they already have established administrative procedures and administrative departments.

6.5.2 There are several topics for which training, in the form of courses and consultancy follow-up, needs to be available:

— **Basic Administration**
— **Basic Financial Management**
— **Employment Law**
— **Staff Management**
— **Premises Management**
— **Planning and Control**
— **Monitoring and Evaluation**
— **Internal Communication**
— **External Communication**
— **Fundraising.**

Training in some of the basic skills such as letter writing, filing, record keeping and office management is often provided by Colleges of Further Education, while the others are covered by the management training organisations described in the previous chapter. It is important not only to ensure that training is available in each area, but also for the sponsors of the project to insist that adequate provision is made for administration right from the start. Ideally, this point should be specifically covered in the 'Manageability Check' when a project is being approved. But it is not always realistic to expect that the people who will be responsible for administration will have been identified before funding has been obtained. In that case it must be ensured that the management committee understands and accepts responsibility for seeing that sufficient administrative skills are obtained in order that the project can function smoothly.

6.5.3 The purpose of this concern for administration is certainly not to make it difficult for people who lack experience in some of the basic administrative skills to become project managers. On the contrary it is to ensure that, if they do, they have sufficient internal as well as external support to give their projects a fair chance of success. It is in this context that transfers or secondments of people with management or administrative skills could be very valuable.

6.5.4 Financial management needs special attention, and every project manager must take responsibility for the proper management of the finances of the project. This does not mean that project managers have to be book-keepers, but they do have to understand and control budgets and bank accounts, and to make sure that all money received by the project is properly handled and accounted for. Furthermore they need to understand the financial bureaucracy of their local authorities and the public sector's attitude towards accountability, which may be rather different from their own. All these points could be covered at **Awareness Days**, and those who lack the initial confidence or ability to handle money could be identified for follow-up support.

6.5.5 There also need to be more courses on book-keeping, more book-keepers (who can often be part-time) available and up-to-date local lists of suitable book-keepers whose services might be called upon. There are many people from the private sector who have had experience in book-keeping and financial control and who, if they have appropriate interests, could well help projects get on top of financial management problems. Furthermore, although there are substantial differences in attitudes between many in the private and voluntary sectors, this is a topic with which local enterprise agencies (which counsel small businesses) might be able to assist projects. Alternatively there are now a limited number of Community Accountancy Projects, for example in Hackney, Southwark, Nottingham and Leicester, which run accounting courses and provide consultancy and advice for

community projects. These are all well received and over subscribed, and similar projects could be established in areas where there is no other way of filling the gap.

6.6 Communicating and Negotiating Skills

6.6.1 Communicating and negotiating are important entrepreneurial management skills. They play a vital role, for example, in obtaining and maintaining funding, in defining relationships with other organisations and in obtaining premises. Yet we found that they were comparatively neglected subjects. The Economic Development Unit of the London Borough of Hammersmith and Fulham have introduced short courses on these subjects and LGTB's distance learning pack for Economic Development Officers covers them. The Directory of Social Change holds seminars, and publishes literature, on fund-raising which stress their importance, but there are many areas of the country where little help is available.

6.6.2 More courses are provided on communication, for example by Comedia and Interchange, based in London, and by the Open University. Polytechnics sometimes run general courses. At a more specific level the British Trust for Conservation Volunteers (BTCV) and others provide courses in such subjects as report writing and graphics, with particular reference to their own interests, and many technical aid centres provide instruction on specific techniques. However more courses are required which focus not just on the techniques of communicating but also on the strategic aspects (e.g. defining purposes, and identifying and reaching target audiences). The models for such courses already exist, but the demand may not, as many projects do not wake up to the need to justify themselves and communicate their success until it is too late. Again if these matters are emphasised, and budgeted for, at the planning stage and reinforced, for example, at Awareness Days, the demand for courses should certainly increase.

6.7 Training for Management Committees

6.7.1 A management committee is usually just a group of people, often representing client groups, funders and other bodies with an interest in the aims of the project, who come together to start and run a project. They often have no experience of managing a project themselves and yet are put in the position of having final responsibility for it. Often they do not understand what being on a management committee entails, what their responsibilities are, how to organise and conduct meetings or how to implement action

— "There is a widespread tendency to believe that talking about something is equivalent to doing it."

The case studies and action learning sets revealed that management problems are often attributed to management committees, for example through their lack of ability to recruit and manage staff, to deal with conflict or to provide support.

6.7.2 In many respects this is not surprising. The individuals will almost certainly not have worked together as a group before. They will probably not have thought through the role of the committee or of the individuals on it. As many projects are comparatively new, they will probably not have reached the stage of having established procedures which can be explained to newcomers. Some members might prefer not to become too deeply involved, but would not like to give this impression, and different individuals may have very different ideas about the project. All these are obviously potential sources of conflict, and yet they are likely to be ignored until a crisis arises. Instead the committee will concentrate on managing the project, rather than sorting out their own problems, and would not consider that they themselves might need help or preparation.

6.7.3 Some simple steps could be taken to alleviate most of these problems. First of all, a **leaflet** explaining what is expected of the management committee and its members would seem essential. (AAMFACT in Leicester have devised a stringent set of conditions). Secondly, an **induction course** for the management committee as a whole could be very useful, or alternatively a consultant could be brought in to organise tailor-made seminars for the committee as for example, was done at Windmill Hill City Farm in Bristol. Also, since committees lose members from time to time new members could benefit from an induction course. Such a course would tell management committee members of their roles and responsibilities, and help them to work out ways of working with each other. For example, it can be helpful for specific roles or responsibilities to be allocated to individuals, particularly on large or complex projects, or else for a committee to be split up into sub-committees to handle particular aspects of a project. Thirdly, management committees could make a conscious effort to review periodically their own performance and effect on the project — and seek outside help if necessary to do so. In this way they could at least recognise when they were causing, rather than solving, management problems.

6.8 Training in Building Development

6.8.1 Because UP gives priority to capital projects, a substantial number of projects involve the development or conversion of a building, even if this is only incidental to their ultimate aims. While by no means all projects take on such a task, for those that do it can be a traumatic experience, involving sums of money and decisions which are far outside their normal experience, even though professional advisers are virtually always retained.

6.8.2 The issues which have to be faced are covered in paragraphs 3.4.5 and 3.4.6, and the DoE's recent good practice guide *Re-using Redundant Buildings* has pointed out that the development approach required in re-use projects, which are likely to be the most relevant ones in urban change, is significantly different from that required for conventional development. However there appears to be no relevant training available, apart from advice from those who have already done it. It would seem sensible to explore ways of preparing suitable training material to fill this gap.

6.9 Conclusion

There are gaps in the current provision of training and support for project managers. A Project Management Support System, enabling advice to be obtained on management issues and on project issues, and an updatable Project Management Handbook would enable many gaps to be filled and help project managers to start building up their own networks of support. Other practical measures could be taken to fill the main specific gaps identified by the research.

Chapter 7 Conclusions, Recommendations And Next Steps

This chapter sets out the main issues concerning the training needs of urban change project managers, summarises the conclusions of the research and the recommendations which flow from them and outlines the next steps which are required to start implementing them, identifying where possible the roles of the various bodies concerned.

7.1 Issues

7.1.1 In the course of this study we have been in contact with over 700 project managers and others involved in the management of urban change. We have found that there is general agreement on many issues concerning training for urban change project managers:

— Urban change is an important national priority

— The problems which urban change projects have to tackle are complex, and good management can have a significant impact on results

— Both the public and voluntary sectors have an important contribution to make to urban change

— Although there is an immense diversity of projects, both voluntary sector projects and those run by local authorities frequently encounter management problems

— There is scope for improvement in the management of the great majority of projects

— Most urban change project managers have little or no previous management experience, and this is likely to continue especially in the voluntary sector

— Project managers receive insufficient management training or support while in post

— This lack of training and support is a major underlying cause of project managers' problems

— The type of management skills required are entrepreneurial skills and basic administrative skills

— Entrepreneurial skills are best learned through experience and on-the-job training

— A great deal of management training is available for voluntary sector projects and for local authorities, but much of it is in the form of courses

— There are gaps in provision which need to be filled

— In voluntary sector projects there is rarely an adequate budget for management training

— In local authorities much more attention is paid to training, but at project manager level the focus is almost entirely on training for professional qualifications

— In spite of these difficulties the great majority of projects achieve positive results. But with inner city problems persisting and with growing emphasis on value for money in publicly funded projects, there is agreement that project managers need more support, particularly in the early stages, if the best projects are to be selected and the best results achieved.

7.1.2 Thus there is general agreement that there is insufficient training and support for project managers and that improved management should yield substantial benefits.

7.1.3 As yet, however, little thought seems to have been given to how to put matters right. In part this is because it is not clear who should take the lead, and in part because at a time when there is great pressure on resources there is a reluctance to divert any money from doing projects to providing support. Nevertheless our research has also uncovered a number of findings on which a co-ordinated effort to provide effective management support could be based. As it builds on what already exists the need for additional resources should not be great.

7.2 Conclusions and Recommendations for Action

Basic Support and Training

7.2.1 There is a strong demand from project managers for relevant management training and support. In particular, project managers wish to benefit from the experience of others so as to be able to tackle the particular problems they are encountering. They need access to timely and relevant information and advice (**5.5**). Although a great deal of experience and expertise has already been accumulated on tackling the problems of urban change, inexperienced project managers do not know how to find it (**3.2.9, 5.6.6**).

7.2.2 The key management skills required are entrepreneurial skills, although a project must possess

adequate administrative skills as well. The principal skills are (**2.7**):

— the ability to communicate and negotiate
— the ability to plan and to readjust priorities
— the ability to motivate and coach others
— the ability to build networks of allies
— the ability to get things done.

These are skills that cannot easily be learned in a classroom, but can be improved through experience and through practical advice. Experienced project managers are able to build up networks of contacts through which they obtain advice, information and support, but inexperienced managers feel left out in the cold (**5.7**).

7.2.3 It is also important that project managers are closely identified with the needs of the community that the project is helping, and that members of that community are involved in the management if at all possible. We identified three key attributes for project managers (**2.6**):

— vision
— concern
— persistence.

Because of this most urban change project managers are likely to continue to come from the voluntary and local authority sectors and to have little or no previous management experience. They will therefore continue to need support and training. In some cases it will be possible to find experienced managers, from say the private sector, who have the necessary attributes to run successful projects, and there are agencies which specialise in finding the right individuals for this (**4.2**).

7.2.4 Two forms of support which would go a long way towards meeting the needs of inexperienced project managers without involving major expenditure are:

— Making sure that each project manager has available to him or her at least two primary contacts from whom to seek advice; one a local generalist adviser, able to provide general management advice and information, the other a source, or sources, of specialist expertise on the particular type of project being tackled. We call this a Project Manager Support System (**6.1**).

— The publication of an updatable Project Management Handbook for use by project managers and their advisers. It would cover the main problems typically encountered and provide tips, notes on good practice, references and other information (**3.1.5**).

7.2.5 In neither the voluntary sector nor in local authorities is much attention paid to management training at the project management level (**5.2.3**), and training budgets are usually inadequate or non-existent (**5.6**). For voluntary sector project managers the emphasis must be on in-post support and recognition of

achievement (**3.4**). Major funding agencies should openly endorse the importance of management training and insist that it and other basic expenses are routinely budgeted for (**6.3.4**). For local authority project managers in-post support is also required but there is also a need to improve their status and career prospects. For those with the potential to manage large multi-departmental projects the emphasis should be on a high prestige professionally recognised qualification, but short in-house courses are also valuable, especially for junior officers and to help team (**3.7.6**).

Recommendations

1. **Steps should be taken to establish a Project Management Support System in each of the main urban areas in England.**

2. **A loose-leaf Project Management Handbook should be published after consultations with a panel of potential users and circulated free of charge to all urban change project managers and advisers. Reproduction of its contents should not be restricted by copyright. Arrangements for systematic updating should be investigated.**

3. **At the appropriate time DoE should include reference to the Project Management Support System and the Project Management Handbook in its Urban Programme Management Guidance Notes.**

4. **Principal funding agencies, including Government Departments, should be asked to endorse the importance of management training for those running urban change and other similar projects and to ensure that adequate provision for it and other basic project expenses (e.g. monitoring performance, communication of results) is made either in the budgets of projects they support or through an area fund to which projects could apply.**

5. **DoE should modify the Urban Programme Project Information Forms to ensure that these expenses are not overlooked in the estimation of project costs.**

6. **Suitable courses for local authority officers to improve entrepreneurial and project management skills should be promoted. Development of a high status post-experience qualification (e.g. at a Management Centre or a leading university) should be examined.**

7. **Efforts should be made to keep track of, and give credit to, successful project managers in the voluntary sector. Consideration should be given to the endorsement of a certification scheme based on the Royal Society of Arts' 'Community Leaders' scheme.**

8. **Efforts should be made to raise the status and enhance the career prospects of successful project managers in both the voluntary sector and local authorities.**

9. Local authorities should identify opportunities for joint training of voluntary sector and local authority project managers and promote them.

Provision of Information

7.2.6 Project managers need clear information. In particular they need information about other projects' experiences and about sources of funds and how they operate (**6.4**). While the Project Management Support System and the Project Management Handbook will fill many information gaps, other means of disseminating information should be encouraged. In particular the circulation of **case studies** and **guides to good practice** should be encouraged (**3.2.9, 6.4.7**) as should the publication of a regular **Urban Change Bulletin** for all those involved in UP (**6.4.10**). Visits to other projects, especially those that have something valuable to teach, which we call **Demonstration Projects**, should be encouraged. We concluded that visiting other projects is one of the most valuable and cost effective forms of learning for an inexperienced project manager (**3.2.10, 6.4.8**).

7.2.7 Even though UP is a well established programme, managers of small voluntary sector projects still complain of the difficulty of knowing what local funding priorities are, how decisions are made and even, sometimes, what the timetables are. Several local authorities are making great efforts to provide information about UP, and many local development agencies are helping to provide information not only about UP but about other potential sources of funding. There is still much to be done to bring every area up to the standards of the best (**3.2.11, 3.5.5, 6.4.5**).

7.2.8 We also concluded that, once projects had been approved, it would be beneficial for project managers to attend local **Awareness Days** at which information about the local authority, the grant regime, basic administrative requirements and local support groups could be provided and useful contacts made (**6.4.6**).

Recommendations

10. A range of responsible bodies should be encouraged to continue to publish case studies and guides to good practice and to ensure that they are more widely available.

11. DoE together with other bodies that support urban change should promote the publication of an Urban Change Bulletin for project managers, members of management committees, local authority staff and the people acting as local advisers and national specialist contact points. A number of models exist for this, and consideration should also be given to updating the Project Management Handbook through this channel, and to offsetting costs by the inclusion of paid job advertisements.

12. Project Managers should be encouraged to visit other relevant projects more systematically, and this should be reflected in projects' plans and budgets. The possibility of sponsorship support for this should be investigated.

13. In order to facilitate such visits all publicly funded projects should be expected to hold at least 2 open days per year (unless there is good reason for not doing so).

14. Certain projects in each category should be designated as Demonstration Projects, and be required to hold extra open days and provide information to other projects. This should be seen as an honour to mark well managed projects. Funding should be made available to cover additional costs fully and the opportunities for sponsorship should also be investigated.

15. DoE and local authorities should review their provision of information on UP and other grants to make sure that it is clear, comprehensive and fully available. This information which should include instructions, procedures, timetables, guidance on funding priorities and how to make contact with the relevant authorities, should be distributed not only through local development agencies, but also via public libraries, Job Centres and Social Security offices etc. and through the Project Management Handbook.

16. Local authorities in conjuction with local development agencies should organise Awareness Days which it should be compulsory for those undertaking new urban change projects with public funding to attend. Managers of existing projects should be invited to attend for part of the day.

Networks

7.2.9 We concluded that the development of **networks** is an extremely important aspect of running a successful project, and that inexperienced project managers, and those running ethnic minority projects in particular, often find it difficult to find their way into relevant networks (**2.6.3, 3.6.4, 5.7**). A major objective of the proposed Project Management Support System would be to help with entry into networks, and the existence of many networked **local development agencies** is a great strength on which urban change project managers should be encouraged to draw (**5.4.2, 6.1**).

7.2.10 Networking can be facilitated by access to information. For example, all projects should be paying attention to internal and external communication (**3.3.8**). They should be encouraged to produce a simple brochure or at least a 1-page project summary, and these could form the basis of a local Project Directory which would facilitate contacts between projects. Similarly the

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development of data on local training opportunities, perhaps through MSC's Training Access Points system, would be very useful (**6.4.8**).

Recommendations

17. **All those who support voluntary sector organisations should be made aware of the value of networks and encouraged to help project managers to gain access to them. In addition local contact points and advisers should be supplied with information on relevant local and national networks. Particular emphasis should be given to helping ethnic minority projects to gain access to networks and to ensuring that existing networks are sensitive to the needs of such projects.**

18. **The possibilities for funding of national or regional specialist networks under the DoE's Special Grants Programme or through the Home Office Voluntary Service Unit or through the European Social Fund should be explored.**

19. **DoE should explore with Manpower Services Commission their plans for easy access to comprehensive on-line data bases detailing management training courses and distance learning resources.**

20. **Each UP funded project should be required to provide an up-to-date brochure or 1-page summary of its aims, and how it can be contacted. The local authority, the local development agencies and regional DoE should all receive copies, which could form the basis of local director of projects.**

Project Planning

7.2.11 Good planning is important for good projects. Not only should projects deal with high priority needs but they should be well thought through, adequately resourced and manageable. Many of the management problems which projects subsequently encounter can be traced back to their initial design. Most projects are assessed for their technical feasibility, but we did not find much evidence of operational plans being required or the **'manageability'** of projects being checked (**Exhibit 11**). This is a pity for, far from being a means of discouraging innovative projects, it is a mechanism for ensuring that risky projects receive proper support. However the task of assessing projects in this way is a comparatively new one for many local authorities (and others) and specific training for it will be required (**3.2**).

7.2.12 In order to avoid unnecessary planning on projects for which there is no chance of funding being available, we concluded that a **two-stage selection process** should be encouraged, so that high priority projects can be identified early in the cycle, following a simple screen, and resources concentrated on working

up thorough plans for them. This would also help ensure that particularly worthwhile ideas did not fail to receive funding due to lack of preparation. Small projects, however, should not usually be required to prepare plans in such detail (**3.2.6**). We also concluded that where **link officers** had been appointed by local authorities they provided a valuable service in helping inexperienced groups develop proposals and plans (**3.2.8**). Where local development agencies had established **seed capital funds**, as in Birmingham, to enable voluntary groups with no resources to prepare better plans, we concluded that this type of initiative should be encouraged (**3.2.7**).

Recommendations

21. **A two-stage project selection process should be encouraged for UP. It should apply to both local authority and voluntary sector projects. High priority and vulnerable projects should be identified at an early stage and efforts concentrated on their planning.**

22. **Regional DoE should normally expect that properly thought through plans are prepared for applications over a certain size (e.g. £50,000 per annum or £100,000 cumulatively).**

23. **Local authority and DoE officers should make simple 'manageability checks' on the plans of projects they approve to ensure that areas of potential weakness, and the appropriate support required, have been identified. Details of these should be made available to the relevant local adviser.**

24. **More local authority officers should be trained in project analysis and assessment, particularly with regard to how projects will be managed and what support would be appropriate for them.**

25. **Local authorities should be encouraged to appoint link officers to assist voluntary sector projects and to work with local development agencies in improving relationships between the local authority and the voluntary sector.**

26. **Local development agencies should be encouraged to raise seed capital funds to help the development of funding proposals.**

Training Courses

7.2.13 Although we concluded that there is a basic mismatch in the field of management training in that training organisations mostly provide courses and consultancy while project managers primarily want on-the-job information and advice, we have also pointed out that the real problem is lack of access to informed advice rather than a surplus of courses (**5.8**). Indeed training courses can be valuable in helping to fill gaps in

basic skills and knowledge. It is important to ensure that a **full range of suitable courses** is available in each area (**6.5**), and that projects have **sufficient annual budgets for management training**. We estimated that £250–£500 per annum would often be sufficient, allowing for up to 5 days 'training' of all types for the project manager (**6.3.3**). We also concluded that **management committees would benefit from training** especially at the start of a project to help members sort out their roles and responsibilities (**6.7**).

Recommendations

27. **Steps should be taken to ensure that suitable courses for urban change project managers are available within or close to each area covering the following basic subjects:**

     — **Basic Administration**
     — **Financial Management**
     — **Employment Law**
     — **Staff Management**
     — **Building Development**
     — **Premises Management**
     — **Planning and Control**
     — **Monitoring and Evaluation**
     — **Internal Communication**
     — **External Communication**
     — **Fundraising.**

28. **Short introductory courses or seminars for management committees should be provided in each area, and stipulated in initial project plans.**

29. **Each project manager should expect to spend about 5 days per year on management training (including project visits, awareness days, courses etc.), with a budget of, say, £250–£500 per annum.**

Ethnic Minority Projects

7.2.14 We concluded that the problems which those running ethnic minority projects face are basically similar but more extreme than those found in other small voluntary sector projects (**3.6.3**). However, the gap between ethnic minority groups and the local authority — at least as far as UP is concerned — appears to be even wider. There is a widespread feeling among ethnic minority groups that those with authority do not understand or even sympathise with their problems and their needs, which is often attributed to racism (**3.6.4**).

7.2.15 We also concluded that UP represents a particularly important source of funding for ethnic minority groups, especially for the development of management skills through the **management of projects** (**3.6.1, 3.6.2**). We concluded that those running

ethnic minority projects find it especially hard to gain access to relevant networks (**3.6.4**).

7.2.16 The provision of a more supportive climate for voluntary sector urban change projects as recommended in other sections of this report will greatly benefit ethnic minority project managers, but we concluded that certain extra steps could be taken to support them.

Recommendations

30. **Greater emphasis should be placed in UP on the objective of having projects "managed by" members of ethnic minorities rather than just being "designed to benefit" them. DoE should publish these statistics annually.**

31. **The DoE, local authorities, local development agencies, and other bodies concerned with urban change should ensure that all their staff directly concerned with urban change projects are particularly aware of the needs of the different ethnic minority groups in the area and should receive training to this end.**

32. **Information on grants, and how to apply for them and how the local authority works should be made available in all relevant languages. Help from an interpreter should be made available if needed, and high priority projects should be given every encouragement.**

33. **Care should be taken to ensure that as many ethnic minority projects as possible are designated as Demonstration Projects.**

Role of the Public and Voluntary Sectors

7.2.17 Because of the need for co-ordinated strategies and for public investment in the inner cities, the public sector must establish the framework and set priorities. We concluded that the public sector body currently most appropriately placed to undertake these tasks is the local authority. It can also play an important part in supporting local voluntary organisations. However, we also found that relationships between local authorities and the voluntary sector are often strained, although some authorities are trying to develop more of a partnership with the voluntary sector, particularly through the appointment of link officers (**3.5**).

7.2.18 The voluntary sector has an important role to play in urban change, especially through community development projects which not only tackle high priority issues of local concern but also enable members of the community to exercise more control over their lives and to improve their skills and capabilities (**4.3**). Furthermore the voluntary sector also includes many of the organisations and individuals who can provide

support, either locally or nationally, to project managers, including if necessary local authority project managers. The voluntary sector is therefore part of the solution as well as part of the problem, and its full participation in the proposed Project Management Support System should be encouraged (**5.4**). We also noted that a large voluntary organisation like NACRO was in effect **'franchising'** out some types of project to local management teams. By 'franchising' we mean taking a standardised approach to similar projects in different areas and providing thorough training and administrative support and ensuring quality control. This seemed a concept worth following up.

Recommendations

34. **Both the public and voluntary sectors should be encouraged to participate in the proposed Project Management Support System and to see urban change as an opportunity for constructive partnership.**

35. **Seminars and case studies of good practice for local authority Chief Executives, Chief Officers and those concerned with urban change should be prepared on a series of urban change topics and include emphasis on the benefits of working with the voluntary sector.**

36. **The concept of large voluntary organisations 'franchising' out projects to local management groups should be explored and encouraged where appropriate.**

Role of the Private Sector

7.2.19 This study has not focussed on projects run by the private sector. Nevertheless the private sector contains considerable management resources and, if the very substantial differences in outlook can be overcome, the private sector ought to be able to provide valuable support to project managers (**4.2, 5.4.7**). This is already taking place to some extent, especially through personal contacts and through secondments. It is our intention that the Project Management Support System should provide opportunities for gradually increasing this support through, for example:

— the inclusion of urban change project managers on suitable company training courses

— the use of companies' in-house training facilities and expertise

— the **'twinning'** of companies with urban change projects (so as to encourage each to take an interest in the other, rather as towns in different countries and cultures are 'twinned').

The more opportunities that can be created for people who have skills to offer and to share to become seriously involved, even in only a supporting role, in urban change

projects, the sooner will more of the problems of our inner cities be overcome.

Recommendation

37. **The private sector should be encouraged to participate, where appropriate, in the Project Management Support System. Ideas such as shared use of companies' in-house training facilities and 'twinning' between companies and projects should be explored.**

7.3 Next Steps

7.3.1 There is general agreement about the issues. The recommendations for action are fairly straightforward and on a manageable scale. They do not, for example, advocate the establishment of an entirely new type of agency, as has been done to support small businesses. Rather the recommended approach is to build on what already exists and to formalise matters only so far as to ensure that good practices reach all the urban areas in the country.

7.3.2 The recommendations listed above will be of interest to several different bodies. It is suggested that:

— The attention of the **Department of the Environment** is drawn to **all the recommendations**

— The attention of **local authorities** should be drawn to **Recommendations 4, 6, 8, 9, 12, 15, 16, 17, 21, 23, 24, 25, 31, 32, 34 and 35** perhaps in the first instance, through the **Association of Metropolitan Authorities**. However it should be noted that several authorities are already implementing some of these measures, either in full or in part, and indeed they can act as examples for others to follow

— The attention of the **Manpower Services Commission** should be drawn to **Recommendations 1, 4, 10, 19 and 29**

— The attention of the **National Council for Voluntary Organisations**, and through it appropriate local development agencies, should be drawn to **all the recommendations**, and in particular to **Recommendations 1, 2, 7, 8, 10, 16, 17, 20, 26, 28, 29, 31, 34, 35 and 36**

— The attention of the **Local Government Training Board** should be drawn to **Recommendations 1, 2, 6, 16, 24 and 35**

— The attention of the **Commission for Racial Equality** should be drawn to **Recommendations 1, 2, 4, 17, 30, 31, 32 and 33**

— The attention of **major funding agencies**, including private foundations, government departments and the EEC should be drawn to **Recommendations 4, 12, 13, 14, 16, 17, 18, 28, 29, 31, 33, 34 and 37.**

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7.3.3 Although several bodies can make contributions which will in themselves bring benefits to projects, there is no one body which can realistically be expected to take the lead in implementing the proposed Project Management Support System nationally. Nor will any party be particularly keen to provide additional resources in the present climate. However, by building on what already exists locally, the need for additional resources can be minimised. But this means that implementation must be organised locally. This is not an obvious role for central government and no local authority has a total perspective. There are voluntary sector bodies, notably NCVO, that could take a lead, but they would require special funding and their role in relation to local authorities— who would be expected to play an important part in each area — would be ambiguous.

7.3.4 We therefore propose that the establishment of a **Working Party** with representation from central government bodies (including DoE, Home Office, MSC) local authorities, the voluntary sector and private funding agencies. EEC representation might also be considered. The Working Party should oversee the implementation of the main recommendations of this report in one or two **pilot areas** in different parts of the country. Areas would initially be chosen where there was support and interest from the local authority and local development agencies. The main aim of the pilot schemes would be:

— to see if a local Project Management Support Scheme can be established and to measure its cost and effectiveness

— to explore alternative means of maintaining an effective Support System and to assess their practicability

— to recommend improvements to the proposed Support System and advise on its extension on a national basis.

As part of this exercise the Project Management Handbook should be published, and the other recommendations in this report followed through locally. The Working Party should aim to conclude its work within a year and report back to its constituent bodies.

7.3.5 Since much of the preliminary work has now been done the costs of undertaking these pilot schemes should not be great (apart from the publication costs of the handbook). Private funding and support under the MSC/Department of Education and Science's Local Collaborative Projects scheme could be sought to cover most of the cost.

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