

Lessons Learned Booklet 1: Projects

INSIGHTS & PERSPECTIVES



ABORIGINAL HUMAN RESOURCE
DEVELOPMENT COUNCIL OF CANADA

INTRODUCTION

The Aboriginal Human Resource Development Council of Canada works with a variety of partners on projects providing training and employment opportunities for Aboriginal people. Part of the Council's role as a learning organization is to document the lessons it and its partners have learned as a result of working together on these projects.

This booklet provides some examples of the *Lessons Learned* during the course of doing project work. The Council believes this information will be of use to any organization that has started, or is about to start, a large scale training or employment project. Perhaps *you* can already relate to some of the lessons outlined. We encourage you to identify those lessons you find most informative and provide some insight into the lessons that could be expanded upon into their own booklet. You are provided with the response form, so please fill it out and return to the Council and we could use your suggestions for future publications.

LESSON THEMES

The lessons learned that are documented in this booklet have been developed along various themes. The overall success of a project is made up of many *little* successes.

Lessons Learned	
Partnerships	Creating an inclusive partnership team to aid in the development and delivery of project objectives.
Governance	Establishing a chain of command for the project for communications, administration, public relations, and accessing funds.
Management	Having a successful project outcome through effective project management.
Accountability Framework	Establishing and maintaining an accountability framework for the integrity of your project.
Knowing your Labour Market	Creating a project that meets and involves accurate knowledge of the market in which your project will take place.
Research	Conducting research for your project.
Database	Setting up a database required by your project.
Evolving HR Technologies	Adapting to changing demands in human resource technology.
Communications	Making communications work for your project.
Monitoring	Maintaining a clear understanding and action plan to reach project goals.

LESSONS LEARNED IN FORMING A PARTNERSHIP

Objective – Creating an inclusive partnership team to aid in the development and delivery of project objectives.

The dynamics of a good partnership for a project depend upon the accurate assessment and planning concerning the membership. A partnership must be inclusive of all stakeholders affected by the project. In the area of human resource projects, partnerships should contain representatives from the community (Aboriginal and non-Aboriginal), Human Resource agencies, education, and the private sector.

1. Establishing the Project Committee:

When configuring the Project Committee, it is important to be aware of the need to have an inclusive and well planned approach when seeking partners for a project. Consider the project goals when making a list of potential partners. Creating partnerships for any project is a fundamental step towards creating an entity that will take on the challenge of seeing a project through its objectives. Ensure you are aware why your potential partner's participation in the project will meet their own organization's mandate. Once a list of potential partners is refined, the next step is to invite representatives to a general meeting to share information and objectives about the project. Clearly define the role you wish them to take on in your project.

Key Lessons Learned are:

- a. Appropriate and relevant committee members are recruited to the project committee.
- b. The organizations involved need to be informed of the time and work commitment required from them.
- c. Each party must be very clear as to the project goals and the ability of each party to achieve the desired outcome.
- d. The duties and responsibilities of the chair positions must be clearly defined and respected.
- e. It will be clearly understood and communicated how each organization's contribution will be utilized during the project.

2. Maintaining a Strong Partnership:

During the progression of the project, maintaining the partnership among all the contributors and stakeholders will be an important task of your lead organization, chair(s), and most importantly, your project manager or coordinator. Members of the partnership will need to have their individual mandates addressed during the project. By creating this opportunity, the partners will have defined roles in the project. Defined roles will also ensure each organization utilizes its time productively. Taking the time to meet and address all partners' goals will build stronger relationships within the project.

Key Lessons Learned are:

- f. Opportunities need to exist for partners to bring forward concerns or items of discussion related to the project.

- g. All partners have the opportunity to provide input on major decisions affecting the progression of the project.
- h. Communication is a major aspect of the partnership. All meeting minutes must be circulated, especially to those not in attendance.
- i. During your project phases, the partners' need to be absent for extended time periods while they concentrate on other projects must be accommodated. Keeping them informed and involved in other ways during absences from the project will ensure continued participation.

LESSONS LEARNED IN PROJECT GOVERNANCE

Objective – Establish a chain of command—communications, administration, public relations, and accessing funds—for the project.

Establishing the Governance Committee and operating with it:

Every project needs a strong outline of its governance structure. This aspect of the project will sometimes be referred to as the “administrative” or the “executive” committee. The members of this smaller group have representation of your project’s funding agencies, key AHRDA(s), and perhaps a main employer or education representative involved in the project. The key responsibilities of this group will be to make decisions regarding allocation of funds, key strategic decisions for the project, and to possibly decide on additional partners or funding resources that could be added to the project. This group works with the entire project team and helps the manager/coordinator work through various elements of the project to reach the final outcomes.

Key Lessons Learned are:

- a. Once the governing committee is created, ensure the rest of the project partners clearly understand the roles and relationship of the governance structure.
- b. The Project Manager must be able to work within the governance structure without interference of outside issues.
- c. If there are conflicts within the project in relation to governance, it is best they be brought to the committee table for discussion, clarification and resolution.

LESSONS LEARNED IN PROJECT MANAGEMENT

Objective – Having a successful project outcome through effective project management.

Setting up Project Management:

Project Management is the conduit of the project process that takes the elements of the initiative through the journey and gets it to the final product, whatever that may be. A successful management outcome depends on many elements, including: the level of participation from partners, resourcefulness and adaptability of the team, and the level of cooperation and vision of the community and partners.

Key Lessons Learned are:

- a. Having funders actively taking part in decisions and listening to the concerns of the other committee members helps the manager maintain a positive flow of communication.
- b. From a management perspective, there is never a loss for direction when there is an active project committee. Therefore, having multiple committee members to turn to when seeking needed ideas and next steps is helpful.
- c. The committee must agree the manager needs to operate at a certain level of independence, although committee members will be available for consultation as required.
- d. In the operations of a large committee, there may be times when, due to different views and perspectives, the manager has difficulty making decisions.
- e. Moving priorities and action plans through a committee are often difficult tasks.
- f. The Project Manager must be able to effectively deal with the personal agendas of committee members.

LESSONS LEARNED IN ESTABLISHING AN ACCOUNTABILITY FRAMEWORK

Objective – Establishing and maintaining an accountability framework for the sense of integrity of your project.

Each project needs to be accountable for its actions and outcomes in order for funding organizations and partners to relay to their own agencies the effective use of the time, efforts, and contributions made towards the initiative.

1. Establishing Clear and Measurable Objectives:

When creating a timeline for your project, it is important to indicate the key milestone dates you will utilize to measure the progress of the project.

Key Lessons Learned are:

- a. Be realistic about goals and timelines. Know the abilities of the team and the “project climate.” Project climate refers to the community awareness and buy-in from the area in which the project is being introduced. If your project is not gaining momentum as planned, adjustments may be necessary.
- b. Clearly communicate to all members of the committee how their role in the project affects the accountability factor of the project. If you have a member that is not meeting target dates, you will need to discuss this issue and come up with a beneficial plan of action to reach your goals.
- c. As you reach milestones, celebrate them! By keeping a positive attitude among your committee, everyone looks forward to reaching success together.

2. Fund Allocation Process:

It is critical to overall project management and success to have a clear plan for allocation of project funds. This plan will follow your original proposal budget outline.

Key Lessons Learned are:

- a. A budget must be established for specific portions of the project with a clear understanding of the timelines attached and the source that will be sought. Communicate this with the executive and general committee.
- b. For administration ease of the project, establish a limit of expenditure that the project manager can approve without having to bring forward to the committee. This will save time for your members and instill a greater sense of responsibility in your manager.

3. Reporting Systems:

Each project must develop a clear and concise reporting system. This will ensure your project partners have knowledge of the progress and positive community impact your project is creating. A reporting system will also update the financial aspects of the project.

Key Lessons Learned are:

- a. When you establish your project, it is important to discuss with your partners the aspects they would like to see in the reporting system. What particular data is of importance to their organization? Incorporating this as a reporting feature will help ensure their funding requirements are being met. This will save time as multiple reports are not required.
- b. Ensure your project team has set out clear methods for reporting the progress. If you have a large project team you should agree on a format for the capture of report data.
- c. Your report should contain qualitative as well as quantitative data. Community members reading your report will be interested in the social and holistic aspects your project produced. Funders will need quantitative data such as how many jobs were secured or created or how many training opportunities were gained and at what cost.

LESSONS LEARNED IN KNOWING YOUR PROJECT LABOUR MARKET

Objective – Creating a project that meets and involves accurate knowledge of the labour market in which your project will take place.

Knowing the labour market demands is one aspect of market knowledge you need to consider when planning your project. Researching employment forecasts in your region is imperative because you want to align the resources with future work demands. For example, you might consider training a large number of people in call centre operation if you knew one was being built near your community.

Research the labour market needs and you could happen across a needed service for which your project could train workers. If, for example, your organization is training people in a new technology, in order to make a sound judgment you should conduct research and survey your surrounding area to gather information as to whether or not to proceed with the project as a result of the regional demand for the service.

1. Understanding your Market region:

When undertaking the planning of your project, you must be clear about the region your project intends to encompass. This will help plan additional aspects, such as identifying stakeholders and other potential partners. If you are clear as to the outreach your project will have, you will have a definite zone in which to work.

Key Lessons Learned are:

- a. Once you have selected your market and project impact region, clearly outline it in your documentation.
- b. Create a portion of your communications plan to answer questions about the process and your decision to operate the project within certain areas.
- c. Ensure your project committee fully understands the process and reasons behind having the project in a certain region.

2. Ensure your project has the ability to change its market scope:

You may begin establishing the project within a certain region and find parties (private sector or additional communities) who wish to take part in the project, possibly resulting in a positive influence. You will need to revisit your governance and committee structure should you enhance your outreach.

Key Lessons Learned are:

- d. Policies which allow flexibility in addressing market outreach need to be in place.
- e. In order to come to a consensus, all partners need to be engaged in the discussion.

LESSONS LEARNED – RESEARCH PAYS DIVIDENDS

Objective – Conducting research for your project.

Adequate and useful knowledge is absolutely essential for every project, whether you are developing a product to market, starting a service enterprise, or providing skills to people and helping them find employment. Knowledge about your clients, markets, government agencies and regulations, and economic trends are critical for turning an *idea for a project* into a *workable and successful project*.

1. Establishing what knowledge a project needs:

Before any research can be conducted, you must determine *what information* you need to know. Before a project can even begin, the project team has to decide what information is required to help achieve the project's goals step-by-step. This activity is often more difficult than carrying out the research itself.

Key Lessons Learned are:

- a. *Knowledge* is information that you can *understand* and *use*. Raw facts and isolated data are not Knowledge.
- b. You must think through *every step* of your project in detail to determine exactly what information is needed to carry out that step.
- c. Consider the “decision points” in your project; determine what information is needed to make critical decisions.
- d. Be very selective about the information you decide to gather; compare your project design with that of other projects. Too much information can often overwhelm a project.

2. How to conduct research:

After you have identified what information is needed for your project, you must find ways of obtaining it. The information you want is often scattered among many sources. Frequently, no one person or agency has all the information you want; they each have fragments of it. Many sources taken together provide a realistic and useful picture of your objectives.

Key Lessons Learned are:

- e. Before you can conduct any research, you must identify information sources that are *accessible* and *reliable*. Government reports, university studies, and surveys by well-known agencies are usually reliable. Anecdotes, amateur surveys, and most private websites are usually far less reliable and information from them should be carefully checked against proven sources.
- f. When possible, find more than one source for the same information. Compare sources to verify data.
- g. Seek sources that will be available for at least the life of your project (and into follow up).
- h. Document all information carefully; you will frequently want to go back to sources to help solve problems.

3. The role of research in your project:

In general, research plays a key role in three distinct phases of a project – *Conceptualization*, *Implementation*, and *Evaluation*. In the first phase, research helps to answer the question, “What exactly, in concrete terms, do I want my project to accomplish?” In the second phase, it helps to answer, “How can I effectively achieve the objectives of my project?” And in the third phase, research helps to answer, “In measurable terms, did my project reach its goals?”

Usually, research for the first phase is the most critical; weak research for this phase is a poor foundation for a project.

Key Lessons Learned are:

- i. Set out clear research questions that have meaningful answers. For example: instead of, “Is my training plan good for my clients?” ask “Will my clients score high enough on a certain entrance examination to continue their training?” The second question is testable and can be used to evaluate your project.
- j. Research specific areas that will provide information that will affect the direction of your project. For example, determine whether the target job market can actually absorb 50 class-B welders *before* planning the training program. A good question is one whose answer will change the direction of your project.
- k. Research those projects that have failed as well as those that have succeeded. It is important to know about potential problem areas early in your project’s design phase.
- l. A project built on sound research will be better accepted by funders and is more likely to lead to future follow up projects.

LESSONS LEARNED IN DEVELOPING A STRATEGIC DATABASE

Objective – Setting up a database required by your project.

Databases are crucial to almost all projects, whether the goal of the project is to market a product, train people, or find them employment. Databases provide information about people who will benefit from the project, the marketplace for products, or job opportunities for a particular workforce. And most importantly, databases *track* the progress of your project – tracking information is vital for continuous improvement of the project.

1. Setting up the Database:

A major pitfall in setting up a database is to collect all possible data related to the project. Although a case can usually be made for each item, data files become awkwardly large and the computer database system becomes too complicated.

Key Lessons Learned are:

- a. Not all interesting data is useful to the project.
- b. Collect only data that is essential for achieving project goals.
- c. The database must be easily usable by the project team.
- d. Do not alienate clients by attempting to obtain certain personal information.

2. Know the culture and demography of your clients:

It is essential that database designers understand the culture and demography of the client population. Culture and history strongly determine how language is used and affect the very meaning of words.

Key Lessons Learned are:

- e. The database team must thoroughly understand how clients from different cultural groups interpret concepts in database questions.
- f. Survey questions must use language and wording that are easily understood and not confusing.
- g. Be aware that some people will not respond to questions they feel are too personal. Be certain to explain what “Confidential Information” means with regard to your database.
- h. It is important to test the survey process:
 - i. Do clients have trouble filling out forms?
 - ii. Verify responses; are you getting reliable information from your questions? Try testing your survey form on a small group; then vary the data.
 - iii. Compare data gathering methods: face-to-face interviews, group sessions, mailings.

3. Using the Database:

Data stored in a database is useless unless it can be accessed easily, clearly understood, and made available to all users on a timely basis.

Key Lessons Learned are:

- i. Project personnel must be trained to retrieve useful information from the database. Only information that is useful and usable should be put in the database.
- j. Non-technical personnel and other interested parties must be able to understand the output from the project database. Reports must *interpret* the data, not present it raw.
- k. Statistics are often confusing; fully explain what is being presented.

4. Working with other agencies:

Almost every project will involve working with government or private agencies that utilize databases. These agencies sometimes feel your database is duplicating their efforts and confusing clients. They also may believe there is a conflict of mandates to gather and utilize data from the same group of people.

Key Lessons Learned are:

- l. In the planning stage of your project, establish dialogue among agencies using similar databases in order to resolve potential mandate issues.
- m. Where possible, collaborate with other agencies on the initial design of your database in order to make future sharing of data easier.
- n. Establishing links to other database systems often provides new insights and can lead to better designed next-generation projects.
- o. If necessary, be prepared to adapt your project to avoid conflict with other agencies. Strive for the full cooperation of all relevant parties and agencies.
- p. When working with other agencies, negotiations may be required to address confidentiality issues that affect the sharing of data.

LESSONS LEARNED FROM EVOLVING HUMAN RESOURCE TECHNOLOGY

Objective – Adapting your project to changing demands in human resource technology.

Employers increasingly use the Internet to recruit and for many other human resource functions within their organizations. An example of this trend is a major resource company working in the Alberta oil patch that advertised for heavy equipment operators and requested applicants email resumes.

Responding to Human Resource trends:

Over 3000 people from North America responded to the company's advertisements for 64 positions. The company used specialized software to ensure only one resume was attached with each applicant's email; otherwise, the application was rejected from the system. This meant that, in order to be eligible for consideration, each applicant had to have enough computer skills to be familiar with basic email functions, fill in a form on the computer, do word attachments, and be able to transmit the information. All future correspondence relating to the job competition was transmitted electronically by the company. This meant job seekers needed continuous access to a computer and an email account in order to stay current on developments relating to their application.

Key Lessons Learned are:

- a. Companies are using the Internet for Human Resource functions, and this means job seekers need to have fundamental computer skills even if they are working in a position that may not require a computer on the job. To not be computer literate means you may be narrowing your opportunities.
- b. Many employment opportunities in today's markets may not even find their way into a newspaper or other sources job seekers traditionally use. Through computer access, job seekers may avail themselves of a wider range of training and employment opportunities.
- c. Internet use enables companies to effectively advertise their positions across a much wider area. This means that competition for jobs is even greater than before. Applicants need to identify their competitive advantages if they hope to "stand out" from the crowd.
- d. In the case study related here, northerners from Saskatchewan who wanted to apply for the job didn't necessarily have a computer at their house and nor did they know how to use email. However, most communities have a library or other centre that has computer access available to the public. Local adult education centres also offer courses or help in basic computer skills. Resources are often available with a little research and ingenuity. Job seekers don't have to feel excluded from the electronic job market whatever their age or location.

LESSONS LEARNED – THE ROLE OF COMMUNICATIONS

Objective – Making Communications work for your project.

No project works in isolation. Many parties are involved – there are the people served by the project, there are funders, as well as community stakeholders and the general public. You must ensure there is an interchange of needed information between each of these parties.

Communication comes in many forms: telling the target population about your project's goods or services; motivating your clients to participate in the project; maintaining accountability with your funders and the community of stakeholders; and most importantly, receiving constant feedback from the public. All these aspects of communication taken together make up the project's Communications Plan which should be thought out in detail as the project is being designed.

1. Who Is The Communications Plan Aimed At?

Before you undertake your project, you must decide who needs to be informed about what. Because communications work is time consuming and often expensive, you must develop an adequate rationale for each communication initiative. However, it is just as important to ensure that key audiences are not missed.

Key Lessons Learned are:

- a. Determine the benefits of informing different target audiences. Weigh cost against benefit for each audience. It is easy to be tempted to believe that expensive brochures, radio announcements, and frequent press releases always help your project.
- b. Remember that communication is a "two-way street." It is important to listen to what clients and stakeholders say.
- c. Strive to have key stakeholders meet periodically to share information as unforeseen problems are often detected in such meetings.

2. Making Communications Effective.

After you have identified audiences for your Communications Plan, you should ensure communications initiatives are actually achieving their objectives.

Key Lessons Learned are:

- d. You should have a means to regularly evaluate the effectiveness of your communications initiatives in terms of expected performance. Always be ready to adjust your Communications Plan if evidence suggests an audience is not getting the intended message.
- e. Try to prevent your clients and stakeholders from developing unrealistic expectations from your project. It is better to present better-than-expected performance than to have to announce failed target objectives.
- f. Feedback from stakeholders will indicate how your project is perceived and allow you to adapt to changing circumstances.
- g. Carefully record all your communications initiatives; they will be valuable in documenting your project in terms of expectations and achievements.

LESSONS LEARNED IN KEEPING YOUR GOALS IN SIGHT

Objective – Maintaining a clear understanding and action plan to reach project goals.

Keeping your project goals in sight can be difficult at times, primarily as the project moves through progression. You may find additional positive outcomes are possible within the work of your project. You may consider making changes to your project in haste; remember not to make any changes without thinking them through. Keeping goals in sight can also help your group keep a positive attitude when things don't progress at the speed you would like.

Maintain a constant awareness of your goal:

Once you identify your goal or your set of smaller measurable goals, maintain awareness of the progress you have completed in achieving them. This helps keep partners aware of where you want to reach with your project. There are many innovative ways to keep goals in sight such as: print them on your letterhead, minutes and emails, or on progress reports at all meetings. Also develop an in-office chart that demonstrates your progress.

Key Lessons Learned are:

- a. Maintain clarity amongst all members as to exactly what the goals are and how you will measure them.
- b. Communicate your goals with communities and, if your project is large and will have impact on others, with the general public.
- c. Ensure management and administration are aware of all goals and can clearly relate the plan with the goals. Remember, if you change personnel during your project, you must not assume new personnel automatically have all the knowledge.
- d. Keep your goal clear and precise. You should have the ability to write one or two sentences about your project goal.
- e. Keep your language in terms of the goal statement in a context everyone can understand. Don't make it too technical or use too many acronyms.

SUMMARY

Strength Through Learning

We have looked at some important lessons many people have learned in ten major areas of project development. These lessons will help make your project stronger. After each project, you should write out the lessons *you have learned* and add them to the list.

You will find several common themes throughout these lessons. They are principles that apply to all aspects of your project, from conception to planning to implementation to evaluation.

Planning Before Action

Careful planning at every stage of a project always pays. Your partners, clients, and community stakeholders will know what to expect from your project and clearly see the progress if you clearly set out project goals, measurable objectives, products, costs, and timelines. Although you can never prepare for everything, you should consider what can go wrong at each stage of your project and have a plan to deal with it. The more “What Ifs” you have thought through, the more likely you will have a successful project.

Keeping Consultation Alive

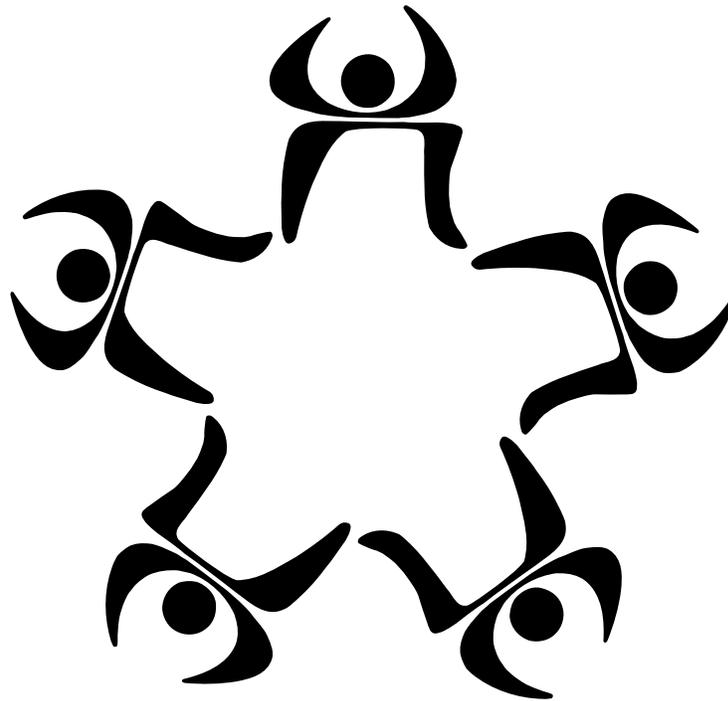
Consultation is the “glue” that keeps a project together. Consultation with stakeholders will help confirm that a *project idea* should lead to a *project plan*. Ongoing consultation always helps correct misunderstandings among project partners and maintains their commitment. Seek input from as many sources as possible; people’s perception of your project will help you make needed “mid-course corrections” and also promote the acceptance of your project’s goals.

Adaptability and Flexibility

All projects evolve throughout their lives. New ideas develop, conditions can rapidly change, and new demands on the project may arise. Not everything can be planned for. You must be able to adapt quickly to changing circumstances. Monitor your project frequently and closely to detect any unexpected changes – then work with your team to respond. You can become more adaptable and flexible by learning what other project teams have done in similar circumstances. Adaptability is also a “work attitude” – keep your mind open to new possibilities.

Future Lessons Learned

The Council would like to gather an indication of input towards future booklets in the *Lessons Learned* series. If there was a particular lesson or lessons your organization would find useful to have produced, please provide our input by using the attached form or log onto our website (www.ahrdcc.com) and fill it out online. We look forward to hearing from you!



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"Creating the Conditions that Create Aboriginal Inclusion"

Lessons Learned Booklet #1: Projects

We are currently in the process of developing support materials for the Lessons Learned contained within this booklet. Your input and feedback will provide direction and insight into the development of these support materials. Please take a few minutes and fill out this reply response form and mail or fax to the Council at:

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If you have any questions, please contact Trina Maher, Manager Aboriginal Skills and Learning.

I would like to see more development and information in the following areas (check all that apply):

- Partnerships
- Governance
- Management
- Accountability Framework
- Knowing your Labour Market
- Research
- Database
- Evolving HR Technologies
- Communications
- Monitoring

Name: _____

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