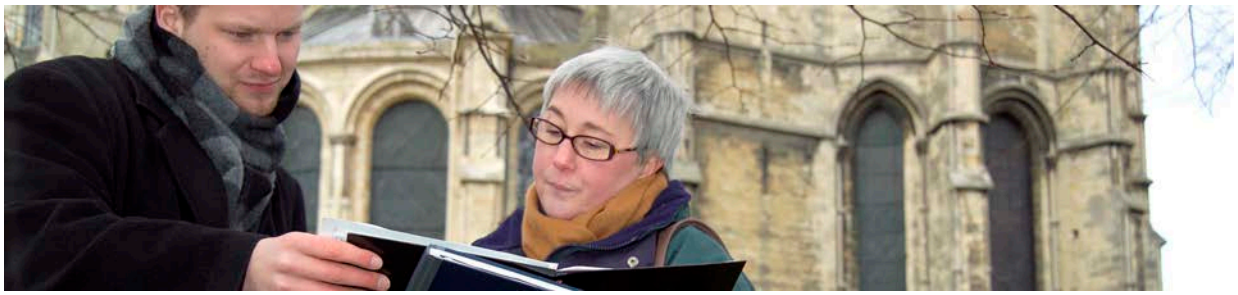
Working in projects using MoRPHE

Course Workbook



This is a distance learning course. You can work through the course at your own pace, and at a location and time that suits you. You need to put time aside and you should allow **three to four hours** of uninterrupted work to complete the course, though this may be spread over several days. You should aim to complete the course within one month.

It is up to you to assess yourself on what you learn.

You are encouraged:-

- to use the online self-assessment at the end of the course to be sure that you have covered all the main points;
- to register online your completion of the course, so that you can be credited with it in future, and be kept in touch with further training opportunities.

Enjoy the course!

Introduction

This ten step course will familiarise you with key sections of the '*Management of Research Projects in the Historic Environment the MoRPHE Project Managers Guide*' ('the Guide').

It covers the essentials you need to know to participate effectively in a project managed using MoRPHE, in whatever role. You will learn:

- the stages in a project, so that you can see how a project proceeds;
- the roles of those involved, so that you can see how your work might contribute;
- the terminology used so that you can communicate effectively about a project with colleagues;
- the key documents , so that you will know where to look for information about a project.

Your copy of the Guide, accompanying this workbook, is yours to mark-up as you wish. Add your own notes, or, if you prefer, add post-it notes to the appropriate pages. Aim to create a reference book that reflects your interests and experience with projects.

Each of the steps in the course includes an instruction to read part of the text of the Guide plus one or more Activities. These are there to help you develop your understanding of the text. Tick these off as you complete them to record your progress. You don't need to complete the course at one sitting.

Some Activities start with the wording 'For a project you are familiar with …'. You will gain most from this course if you have a project in mind, ideally with relevant documents, that you can refer to as an example while you work through the course. If you are new to project working, you may find it helpful to discuss this with your line manager, tutor or colleagues to find a suitable example project.

Step 1)

Introducing the MoRPHE Project Managers Guide

This course uses the following parts of the Guide:

- Introduction on page 2.
- The Statement of Good Practice (page 5).
- The Checklist (page 6).
- Part 1 An Overview of MoRPHE (page 7).
- Part 3 Adapting MoRPHE (page24).
- Appendix 2 Key Project Documents (page 29).
- Glossary (page 35).

Part 2 and the other Appendices are not covered by this course.

Activity: Find the relevant sections in your copy of the Guide now. You may find it helpful to mark them with index tabs for ease of reference during and after the course.

☐ ✓ when finished.

Step 2)

Some definitions

Read the 'Defining Projects 'and 'Defining Research and Development' sections on page 2 of the Guide. Key points to note are:

A project:

- Is something different to normal work.
- Is planned by someone, and approved by someone.
- Has defined objectives.
- Has defined budget, participants, timetable and performance or quality parameters.
- Results in change or innovation rather than continuity.

Research and development:

- Is creative.
- Builds knowledge.
- Can be applied in some way.

Activity: For a project that you are familiar with, how do the definitions of 'projects' and 'research and development' apply to that project?

Note your example in the Notes pages below ☐✓ when finished.

Historic England, and Historic England funded research and development projects contribute to the 'Historic England Action Plan for 2015-2018'.
www.historicengland.org.uk/images-books/publications/he-action-plan-2015-18/
This is organised into a five high-level 'Aims'.

The Action Plan sets out the contribution that Historic England will make to a broader strategy for work in the heritage sector, Heritage 2020, which is available in draft on the Heritage Alliance website at
http://www.theheritagealliance.org.uk/historic-environment-forum/heritage2020
This is organised around five 'strategic priorities'.

Activity: For a project you are familiar with, review the 'Aims' of the Action Plan and the 'Strategic Priorities' of Heritage2020. Identify which is the main focus of your project.

☐✓ when finished.

Step 3)

How MoRPHE works with other guidelines

Read through the text on page 3 and review Figure 1 on page 4.

Note that The MoRPHE Project Managers Guide and associated guidance is available from:-
www.HistoricEngland.org.uk/images-books/publications/morphe-project-managers-guide/

Activity: Identify examples of other advice and guidance sources that may be relevant to projects you are involved in. Note these below Figure 1 in your copy of the Guide.

(Tip: consider, for example, internal desk manuals, ethical standards, process control related guidance, or guidelines describing particular techniques used in a project.)

If you are not familiar with these, ask colleagues, or consult the websites of professional associations, or national heritage bodies or amenity groups. Useful sources include:

- the Historic England website www.HistoricEngland.org.uk
- the 'Introduction to Standards and Guidance in Archaeological Practice' website www.isgap.org.uk

☐ ✓ when finished.

Activity: Visit the web-page for MoRPHE and look through the content. Create a shortcut to this site, or add it to your 'Favourites'.

☐ ✓ when finished.

Activity: Download two of the MoRPHE Project Planning Notes (your choice). Familiarise yourself with the common structure and content of these Notes.

☐ ✓ when finished.

Step 4)

The Statement of Good Practice and Checklist

Read the Statement of Good Practice on page 5.

The Statement is intended to provide general principles to guide project managers in preparing for and managing projects.

Activity: Look away from the page and try to recall as many of the headings as possible. Write down the bold text headings on a separate sheet of paper. (Tip: there are ten of them in two sections).

☐ ✓ when finished.

Read through the Checklist on page 6.

The Checklist provides project managers with a way to check if a project they are involved in is well planned, and that the main areas that are likely to cause projects to fail are considered.

Activity: For a project you are familiar with, compare the project documentation with the questions on the Checklist.

☐ ✓ when finished.

Step 5)

An Overview of MoRPHE and its Adaptation for use

Read the text on pages 7. Note the range of ways in which the generic guidelines presented here are intended to apply in different contexts.

Note also that some terms used within the Guide have specific meanings, which are included in the *Glossary*, (pages 35-36).

MoRPHE is designed to be a flexible approach to managing a project. Read Part 3 pages 24-25.

Activity: Find and consult the *Glossary* for the definition of 'Risk' in the context of project management. Compare and contrast this with the definition of an 'Issue'.

☐ ✓ when finished.

Activity: For a project you are familiar with, how complex do you think the project is? Consider the bullet points in section 3.2 and add notes to page 25.

☐ ✓ when finished.

Step 6)

MoRPHE Project Stages

Read section 1.1 of the Guide, The MoRPHE Procedural model (pages 8-10).

Activity: Highlight or underline in the text:

- **the names given to the stages in a project;**
- **the names given in the text to key project documents.**

(Tip: the key project documents are listed on the right hand side of Figure 2. 'Updated Project Design' and 'Updated Risk Log' will be new versions of the same document, rather than separate documents.)

☐ ✓ when finished.

Activity: Look up 'Business Case' in the Glossary.

Activity: Look up the checklist for a 'Project Proposal' in 'Appendix 2 Key Documents'. Note how the 'Research Aims and Objectives' and Business Case are given prominence.

☐ ✓ when finished.

Read the text of the 'Aims, Objectives, Products and Tasks', box on page 8.

Activity: For a project you are familiar with, identify an Aim, an Objective, a Product, and a Task to supplement the examples given here.

Note these in the Notes pages below or in the margin on page 12 of your copy of the Guide as a practical reminder.

☐ ✓ when finished.

Review table 1 on page 15 which illustrates products, archive and dissemination products that might be developed in a range of sample Execution stages.

Activity: For a project you are familiar with:

- **Identify an example of a stage.**
- **What is produced in that stage?**
- **How are the products disseminated for use?**
- **How are they archived to ensure they are available in future?**

Note your examples here or in the margins of section 1.1 of your copy of the Guide as a practical reminder.

☐ ✓ when finished.

Review Figure 2. Note the 'Review points' R1, R2 and R3. These are the formal points at which the project is scrutinised. The key questions are:

- R1. 'Is this worth doing by us?'
- R2. 'Are we ready to start?'
- R3. 'Is it OK to proceed as planned?'

Activity: Annotate Figure 2, marking the key questions beside each Review Point.

☐ ✓ when finished.

Step 7)

MoRPHE Project Roles

Read Section 1.2 of the Guide *MoRPHE Project Roles* (pages 12-14).

Key points.

- There is no single ideal project team structure.
- How each member of the Project Team is involved must be agreed in the Project Design.
- You can act in different roles in different projects.
- Roles are not the same as job descriptions.
- Your role can change during a project, by agreement in the Updated Project Design.
- Your organisations own guidelines may require that specific post-holders serve in particular roles.

Activity: For a project you are familiar with, note in the margins on page 12 - 14 of your copy of the Guide who holds each of the roles described.

☐ ✓ when finished.

Activity: For a project you are familiar with, identify an example of a Sponsor, a User, and a Curator, as described in section 1.2.

Note these in the Notes pages below or in the margins on page 14.

☐ ✓ when finished.

Step 8)

Appendix 2: Key Project Documents

Read the following sections in this appendix:

- The Document control grid on page 29.
- The checklists for a 'Project Proposal' and a 'Project Design' (pages 30-33).
- The checklist for a 'Product Description' (page 32).

These are the main documents used in planning a project, and you may well be involved in reviewing these even if you are not managing the project yourself.

The checklists are just that: they should not be viewed as fixed templates for every document, but suggested section headings. In particular the Project Design should be a design specific to each project.

- If a particular heading is not relevant, the project manager should state that, with reasons.
- If a section heading not listed here would add to the clarity of the document, then it should be included.

Additional advice on Project Designs for particular project types is given in MoRPHE Project Planning Notes.

Activity: Look through the 'Project Design' checklist:

- **Which section identifies how Stakeholders will be kept informed of progress, as well as how the Project Team will communicate within the project?**
- **Which section identifies the organisational strategies driving the project?**

☐ ✓ when finished.

Activity: Identify the differences, as set out in the introduction to each checklist and in the detail of the checklist sections, between a Project Proposal and a Project Design.

☐ ✓ when finished.

Activity: For a project you are familiar with obtain a copy of the Project Proposal, Project Design, and a Product Description.

☐ ✓ when finished.

Step 9)

Online self-assessment

Congratulations! You have now completed your reading of the Introduction and Part 1 and referred to Appendix 2 and the Glossary.

Activity: Work through the twenty questions below. Try to answer the questions unaided first, but refer back to the pages indicated to read more about any areas that you are not sure of.

This is not an exam! It is there to help you get to know the key sections in the MoRPHE Project Managers Guide, and become familiar with the specific meaning of jargon used.

Circle your chosen answer.

1. How many project stages are there in a completed MoRPHE project? (p.8-12)

A. 3
B. 4
C. 2
D. No fixed number, but usually 4 or more

2. What is/are the main phase(s) of work in a project referred to as? (p.10)

A. Implementation Stages
B. Main stages
C. Execution Stages
D. Products

3. The first document produced by a MoRPHE project is called (p.8)

A. A Brief
B. A Project Proposal
C. A Project Design
D. A Highlight Report

4. An area of uncertainty anticipated in designing a project is referred to in MoRPHE as (p.36)

A. A Problem
B. An Issue
C. A Product
D. A Risk

5. Which of the following is NOT a project team role (p.12-13)

A. Project Management
B. Contractor
C. Expert
D. Executive

6. Start Up of a project is influenced by, among other drivers (p.19)

A. Resources
B. Strategies and Policies
C. Project Design
D. Issues

7. Which of following is included in the checklist for a Project Design, but not in that for a Project Proposal? (p.30-31)

A. Methods statement
B. Communications
C. Business case
D. Interfaces

8. 'An unforeseen discovery, comment, query or suggested change to the project arising during project Execution, which may require an Updated Project Design' is the definition in MoRPHE of (p.35)

A. A Risk
B. Contingency
C. An Issue
D. A Stage

9. A Project Design is initially written during which stage in a MoRPHE project (p.8)

A. Start-up
B. Closure
C. Initiation
D. Execution

10. The decision on whether to continue as planned with a project that is in progress is taken at what point? (p.10)

A. Review point R1
B. Review point R3
C. Execution
D. Initiation

11. Monitoring of a project performance against the Project Design is the specific responsibility of which role in a MoRPHE project? (p.12)

A. Project Management
B. Project Executive
C. Project Assurance
D. Sponsor

12. Roles in a project may be combined (i.e. held by the same person) with the EXCEPTION of which combination? (p.14)

A. Executive and Assurance
B. Project management and Expert
C. Support and project management
D. Project management and Assurance

13. The general subject area of research and development for a project is referred to as? (p.8)

A. An Aim
B. An Objective
C. A Task
D. A Research Agenda

14. Project Documents should be accompanied by a document control grid giving the following information (p.29)

A. Circulation
B. Origination Date
C. Status
D. All of the above, and more

15. Authorisation and funding for the start of execution of a project is committed to a project at which point? (p.10)

A. Start up
B. Initiation
C. Project Brief
D. Review Point R2

16. A Project Design may be informed by which documents? (p.4)

A. Project Managers Guide
B. Project Planning Notes and Technical Guides
C. Existing standards and guidelines
D. All of the above

17. Which of the following are NOT listed in the factors that may affect how MoRPHE is adapted? (p.7)

A. Cost
B. Context and topic
C. Level of Risk or uncertainty
D. Level of control required

18. What is the name given to the section in a Project Proposal that describes why a project should take place in the proposed way, by the proposed team, and which identifies public benefits for public funded research? (p.31)

A. Methods Statement
B. Business Case
C. Research Aims and Objectives
D. Background

19. The skills/aptitudes identified as important for the Project Executive role include, among others, which combination? (p.12)

A. organisational ability, effective communication
B. specialist expertise and team working
C. team working and meeting skills
D. Decision making and delegation

20. Specific research questions to be answered by work on a project are referred to by MoRPHE as which of the following? (p.8)

A. Products
B. Issues
C. Objectives
D. Aims

☐ ✓ when finished.

Activity: When you are ready, call up the website listed below and log your answers to the twenty questions on the online assessment.

http://ehhelm.articulate-online.com/2877930764

To register your completion of the course on this site we will first ask you to provide the following details:

- **your name**
- **job title/position**
- **organisation**
- **email address**

Data protection: The details you enter will be retained by Historic England to assess the uptake of this course and used to send you out a course completion certificate. Your details may also be used to contact you about other initiatives related to the MoRPHE approach. If you do not wish to receive future information, please send an email stating so to train@historicengland.org.uk with the subject 'MoRPHE course'.

☐ ✓ when finished.

When you have finished logging your answers, you will have an opportunity to Review them, and see more notes to help guide you. You can also Retry the quiz.

Step 10)

Taking the next steps

Congratulations! You are now familiar with the MoRPHE approach, and well placed to contribute to historic environment research and development projects.

As time allows, or for reference as your involvement in projects grows, look through the remaining sections of the Guide.

- Part 2 sets out in greater detail the life-cycle of a research and development project.
- Appendix 1 suggests an approach to planning projects and estimation.
- The remaining sections of Appendix 2 provide checklists for the Logs and reports used to manage and communicate project progress.

Remember also that a project management method such as MoRPHE is only the start of good project management. Pay attention in developing your experience to:-

- the use of technology to support your projects,. You will want to understand ways to create and share project documents, project plans, and to keep in touch with your project team;
- the understanding of budget management in your organisation, or the ways in which projects in your sector are funded. You will want to understand what is required by those funding your project;
- and, most importantly, to the 'soft-skills' of negotiation and communication. You will want to be an effective project manager, able to motivate a team of experts to achieve your project objectives.

Good Luck!

Get recognition for your achievement!

We use a LinkedIn group to recognise completion of MoRPHE related training. If you would like to take advantage of this, you will first need to create a profile on www.linkedin.com as follows.

If you already have a LinkedIn profile, you can skip step 1.

Step 1) Follow the instructions on the home page of their website. You need to give your name and email address, plus some other details to create a profile of you and your professional interests. You have extensive control over who can see what is in your profile, and LinkedIn do not disclose email addresses. If you have any concerns, review the LinkedIn privacy policy before joining: there is a link to it at the foot of their home-page.

Step 2) Once you have joined and set up a profile, you may join Groups. You can find the MoRPHE Project Management group in the LinkedIn Groups Directory (Look under 'Interests').

Use a search on 'MoRPHE' to call up details of the group. Then use the 'Join this group' option to let us know you want to join. We will check that we have received notification that you have completed a MoRPHE course with us, then sign you up.

Step 3) Once you are signed up to the MoRPHE Group you can set your profile such that membership of this Group is displayed on your LinkedIn Profile.

We look forward to recognising your achievement with group membership.

Thank you for your commitment and time.

Notes:-