

SECTION 2 TAKES YOU THROUGH THE ORGANISATIONAL STRUCTURING PROCESS STEP BY STEP. IT CONTAINS THE FOLLOWING:

- **CHAPTER 6: GIVES AN OVERVIEW OF THE PHASES IN THE ORGANISATIONAL DESIGN PROCESS AND TOOLS THAT CAN BE USED. EACH PHASE IS THEN DISCUSSED IN DETAIL IN THE SUBSEQUENT CHAPTERS.**
- **CHAPTER 7: PHASE 1: DIAGNOSIS**
- **CHAPTER 8: PHASE 2: DETERMINING ORGANISATIONAL REQUIREMENTS**
- **CHAPTER 9: PHASE 3: DESIGNING THE STRUCTURE**
- **CHAPTER 10: PHASE 4: DEVELOPING THE BUSINESS CASE AND PLANNING THE IMPLEMENTATION**
- **CHAPTER 11: PHASE 5: IMPLEMENTING THE STRUCTURE**
- **CHAPTER 12: PHASE 6: MONITORING AND EVALUATION**
- **CHAPTER 13: PLANNING AND MANAGING THE ORGANISATIONAL STRUCTURING PROJECT**
- **CHAPTER 14: MANAGING CHANGE AND TRANSITION**

(NOTE: BEFORE YOU EMBARK ON AN ORGANISATIONAL STRUCTURING PROCESS, IT IS ADVISABLE TO FAMILIARISE YOURSELF WITH CHAPTER 13: PLANNING AND MANAGING THE ORGANISATIONAL STRUCTURING PROJECT)

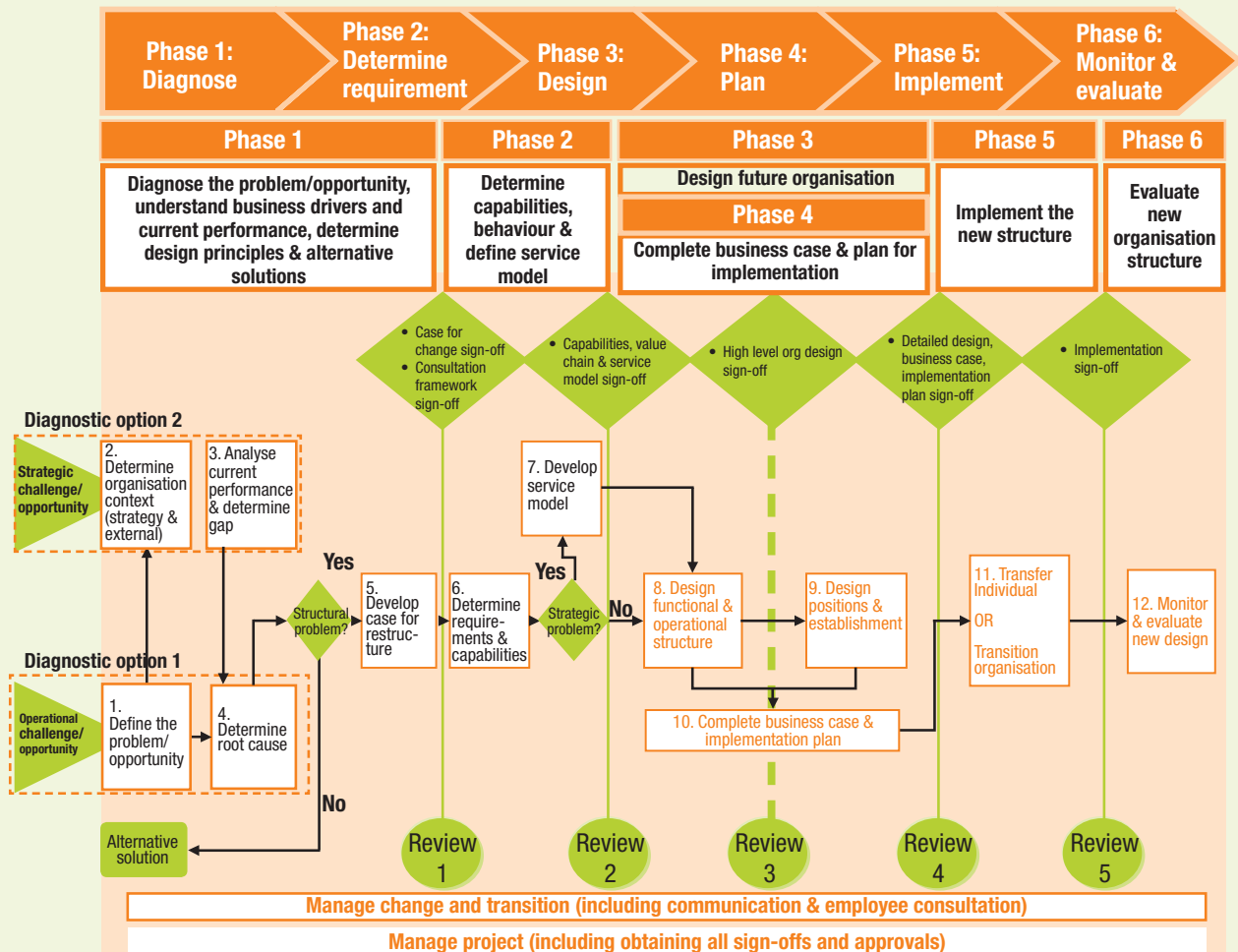
CHAPTER 13

PLANNING AND MANAGING THE ORGANISATIONAL STRUCTURING PROJECT

CHAPTER 13

13. PLANNING AND MANAGING AN ORGANISATIONAL STRUCTURING PROJECT

13.1 OVERVIEW OF PROCESS



Organisational structuring can be challenging. It often involves an array of stakeholders with competing interests and views on what has to be done. It therefore requires sound project management to get the job done well, on time and within budget.

This chapter will assist you in planning and managing the organisational structuring process. The key steps are:

- Obtaining authorisation for the project.
- Preparing the project charter.
- Developing the project structure.
- Preparing a detailed project plan.
- Managing project implementation.

13.2 OBTAINING AUTHORISATION FOR THE PROJECT

The starting point for an organisational structuring is to secure the authorisation or approval for the project from the person with the authority to do so. This will vary from organisation to organisation and would also depend on the complexity or sensitivity of the organisation structuring. In many instances, it will be the Executive Authority or the Accounting Officer (Director General or Head of Department) who will give the initial go-ahead.

It may be useful to obtain approval in principle at the outset, followed by approval of the terms of reference.

Helpful tips	Status
✓ Get the authorisation in writing.	
✓ Be sure that the person authorising the organisational structuring has the requisite authority.	

13.3 PREPARING THE PROJECT CHARTER

You will need a clear project charter (terms of reference) to guide the project. The project charter sets out the key requirements for and expectations of the organisational structuring project. It forms the basis for the “contract” between the client and the practitioner. A clear, well-structured project charter can minimise confusion and misunderstandings amongst the parties involved in the organisational structuring. The project charter also serves as the basis for obtaining formal authorisation for the project.

The main objectives of the project charter are:

- To identify the reasons for the organisational structuring project and what it is expected to achieve.
- To describe briefly what the project will entail and what it will not do.
- To establish the scope and focus of the project.
- To guide the execution of the project.
- To give an indication of the schedule and time frames.
- To give an indication of the resources required for the project.

It is advisable to involve the client (the person commissioning the organisational structuring) and other stakeholders in developing the project charter. You can benefit from their insights and experiences and so improve the clarity of your document.

Note: Drafting the project charter may sometimes only be possible after you have identified and defined the problem or opportunity. Based on the problem statement, it will be easier to draft the project charter and to think intelligently about the project going forward.

The table below provides a checklist for drafting the project charter:

Component	Description	Status
Project title	<ul style="list-style-type: none"> • Gives an indication of the broad intention of the project. 	
Project purpose	<ul style="list-style-type: none"> • A brief statement that captures the aims of the organisational restructuring project. 	
What gave rise to the project	<ul style="list-style-type: none"> • A brief explanation of what precipitated the project, for example change in policy, new legislation, or new initiative to be carried out by the organisation. 	
Expected outcomes	<ul style="list-style-type: none"> • What the project aims to achieve, for example improvement in delivery of a particular service. 	
Who are the clients of the project	<ul style="list-style-type: none"> • Indicate who the main client is. The main client is the person who commissions the project and ultimately must be satisfied with the outputs and outcomes of the project. The main client could be a manager in the organisation, the DG or Head of Department, or the Executive Authority. 	
Scope of the project	<ul style="list-style-type: none"> • Which parts of the organisation are affected – is it the entire department, branch or chief directorate? • It is important to state explicitly what the project will not cover. 	
Who are stakeholders	<ul style="list-style-type: none"> • Identify other stakeholders who might have an interest in the project. This could be another unit in the organisation, another government department, service users, and parliamentary committees. 	
How the project will be executed	<ul style="list-style-type: none"> • Give a broad indication of the project approach and methodology, for example will you be doing a rapid diagnosis or detailed diagnosis; will you conduct interviews or will most of the work be desktop research; will there be site visits? 	
High-level project plan	<ul style="list-style-type: none"> • The high-level project plan would include the following: <ul style="list-style-type: none"> o Project phases. o Outputs and deliverables for each project phase. o Critical milestones with target dates. 	
Project deliverables	<ul style="list-style-type: none"> • Indicate types of documents, for example diagnostic report; business case; or-ganogram. • Other deliverables could include consultative workshops with staff and other stakeholders. 	
Project team	<ul style="list-style-type: none"> • An indication of the kind of team required. This would include consideration of the different areas of expertise required; will the work be done by external consultants or will internal resources be used (or both internal and external resources)? 	
Project governance structure	<ul style="list-style-type: none"> • Indicate if there will be a steering committee. • Who will sign off the various phases of the project? 	
Resources required	<ul style="list-style-type: none"> • Estimate the number of person days required and costs. • Other costs associated with the project, for example equipment, printing, workshop facilities. 	
Logistical issues	<ul style="list-style-type: none"> • If there are particular logistical issues associated with the project, for example travel to site offices away from headquarters; workshops to be organised. 	
Communication implications	<ul style="list-style-type: none"> • Who should be informed about the project? • When should they be informed? • What format should communication and information take? 	

13.4 DEVELOPING THE PROJECT STRUCTURE

The project structure is the machinery or architecture for executing the project. It identifies the roles and responsibilities of the key people involved. If the organisational structuring project is relatively small, the project structure should be kept simple.

The table below sets out a generic project structure for a large organisational structuring project.

Role	Responsibilities
Project sponsor or champion	<ul style="list-style-type: none"> • Usually a very senior official in the organisation. • Drives change management processes. • “Sells” the project to the senior executive and/or the Executive Authority. • Likely to chair the steering committee/reference group. • Signs off those aspects of the project that are within his/her authority.
Project steering committee or reference group	<ul style="list-style-type: none"> • Provides strategic guidance for the project. • Acts as a sounding board. • Usually composed of managers and others who can provide expert opinion and advice.
Project quality assurance/ project coordinator	<ul style="list-style-type: none"> • In large projects a senior manager is usually responsible for providing quality assurance for the project. • Engages with stakeholders especially where there are difficult issues.
Project manager	<ul style="list-style-type: none"> • Leads the planning, design and execution of the project. • Monitors progress. • Responsible for ensuring that all deliverables and documents are produced. • Liaises with stakeholders. • Facilitates communication about the project. • Ensures that all approvals and sign-offs occur.
Project team (practitioners, consultants)	<ul style="list-style-type: none"> • Responsible for carrying out various tasks in the organisational structuring. • Can be organised in work streams.
Project administrator	<ul style="list-style-type: none"> • Provides administrative and logistical support for the project.

In addition to defining the roles and responsibilities, it is also useful to decide how often the structures should meet, for example the steering committee could meet at critical review points, whereas the project team could meet weekly. It is also important to decide who can make which decisions.

13.5 PREPARING A DETAILED PROJECT PLAN

The project charter will provide you with the basis for preparing a more detailed project plan. At this stage you would have identified the project team and you should involve the team in the development of the project plan. The level of detail of the project plan will be informed by the level of complexity of the organisational structuring project. There are many project planning tools available, so use the one that best suits your needs.

13.6 MANAGING PROJECT IMPLEMENTATION

The project manager will have a number of responsibilities during the execution of the organisational structuring project. The main responsibilities are:

- To monitor progress of the project against critical milestones.
- To ensure that deliverables and outputs are met.
- To ensure that all logistical arrangements are made.
- To manage tender processes and consultants.
- To convene regular project team meetings as well as meetings with the project sponsor and/or project client.
- To ensure that documentation for each critical review point is prepared.
- To submit progress reports to the governance structure (steering committee).
- To ensure that all approvals and sign-offs occur.
- To submit final documents (for example, formal submissions and business case) to the project client.

