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A Sustainability Checklist for Managers of Projects

By Tom Taylor

Introduction

Everyone in the world is aware that Planet Earth is in peril – especially to the continuing existence of many of its species – not least the human race.

We are all aware of the concerns and apprehension associated with global warming, climate change, competition for and consumption of finite resources, pressures on biodiversity, toxic legacies, waste and the like.

These issues may collectively be described as “Sustainability, Green Issues and the Environment”.

For many political and social issues the opinions and interests of stakeholders – in this case the public, business and government may be described in three groups: 1. those **for** doing something on the topic, 2. those **against** doing something on the topic and 3. those who are **apathetic** to the situation.

It is the third group of apathetic individuals and organisations which are by far the largest over recent years – this situation will change! Very quickly many of the apathetic parties are going to change to the group which wants something to be done – partly by themselves and especially by others. This will mean that “Sustainability, Green Issues and the Environment” will rise up everyone’s agendas and become pressure points. Shareholders will pressurise Boards of Directors on these issues. Rate payers will pressurise local authorities on these issues. Tax payers and voters will pressurise governments and political parties on these issues. Customers will pressurise suppliers on these issues. Sponsors and stakeholders will pressurise their project teams on these issues. Legislation, regulations, incentives, taxation and commodity price increases will reflect these pressures and are inevitable.

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What will this mean for the managers of projects? They will have sudden and new priority needs resulting from formal and informal requirements to address Sustainability, the Environment and Green Issues on their projects and programmes – to add to their own perceived individual and corporate ethics and responsibilities on these matters.

There will be specific projects and programmes which are directly targeted at these Environmental difficulties and challenges – such as improved coastal defences, recycling schemes, natural energy sources. There will also be issues for these and **all** projects and programmes to contribute positively to improving sustainability and certainly not making things worse – through the duration of the project itself and the operational lifetime of completed projects thereafter through to final decommissioning and disposal. So when these new pressures – which are serious and important – arrive will the managers of the projects be ready and prepared? – Possibly not! Will they have been educated and trained in such matters? – Probably not! And even if they do have some knowledge, is it up to date and relevant to the circumstances? – which are changing?

A Response

In 2005 a small working party in Association for Project Management (APM) in UK identified some of these potential issues and decided to investigate them.

In short the working party assembled a collection of relevant material and made it immediately and openly available to everyone as part of the APM website. See www.apm.org.uk

One aspect of this data collection concerns “The PM Contribution” – and that is the focus of the remainder of this paper.

The PM Contribution to Sustainability, the Environment and Green Issues

Many sectors and industries have their own lifecycles, plans of work and versions thereof. Some of them incorporate aspects and activities related to Sustainability, the Environment and Green Issues. However they may not be consistent or up to date.

To be effective a key theme such as these sustainability matters has to be incorporated into the project plan – much like safety or value or honesty. These are not matters that are optional nor can be “bolted on”, nor can they be covered by occasional themed workshops, nor be delegated to a small group or individual – these techniques will not be as fully effective as an integrated holistic approach.

Thereafter a menu has been devised of possible contributions to a project plan related to Sustainability, the Environment and Green Issues. This checklist is by no means complete nor definitive – one can not just shoehorn this list into a life cycle, it needs to be developed, worked up, thought through, applied, implemented, recorded, monitored, managed etc. and since this is a relatively developing topic with developing techniques it is not an easy matter or quick fix. There is a likelihood that whatever we do it is not enough – as we move towards the target so the target moves further away. It is a challenge!

Also as noted on the website there is a dilemma for many people with a Project Management culture. This may be summarised in a quotation from APM's Project Management Pathways – “A thing which cannot be accomplished should never be undertaken”. However, the outcomes of efforts on sustainability are by no means clear or certain. Therefore historically efforts on projects to aid the environmental agenda have been based on a “leap of faith” that such efforts are the right thing to do and are justified by the contribution to collective efforts at local, national and global levels. However, this good faith approach may be overtaken for the managers of projects as a result of the “pressures” which were mentioned earlier and may manifest themselves in legislation, mandates, instructions, wish lists – with teeth.

Sustainability in Context

Sustainability is one of a growing and important collection of social and other responsibilities which are being addressed by projects and arise on projects in themselves or by the needs of clients, end users or the wider field of stakeholders. Such social needs and policies can include equal opportunities; health, safety and welfare; staff and people development; community contributions; charity and volunteer involvement; fair trading; partnering; supply chain management and local sourcing; stakeholder engagement; communication policies; dispute resolution and certainly **not** least sustainability, green issues, the environment, waste avoidance, energy conservation, etc.

The Checklist

Here are some suggestions for consideration by Managers of Projects for use in front line situations on their projects:

- **Responsibilities for the beginning – to end** – by identifying the client's current, corporate social and other responsibility policies (as above) and how they are to be applied or may change in the project definition and delivery periods and thereafter through use. If the client does not have such policies do they need help in devising them. Or if they are operational or dated do they need to be revised and brought up to date to suit a forward looking, capital project or programme – especially if it is a “change” project.
- **Briefing for your project** – by encouraging and supporting client / customers and sponsor / champions to incorporate sustainability into their statement of requirements – and applying them throughout the project. This can be a specific section of the briefing document or process, and / or can be picked up in individual aspects. It can also be specific in measurable terms or have stimulation of opportunities.
- **Modelling for your situation and culture** – by recommending, understanding and promoting appropriate models at the inceptions emphasising the triple bottom line

(economic, social, environmental) and whole life costings with an awareness and knowledge of financial benefits.

- **Selections of your team participants** – by incorporating sustainability criteria into selecting team members, contractors, suppliers and specialists for their general outlook, credentials and project specific approach. And then writing obligations into appointments and contracts.
- **Strategies for your situation** – by considering sustainability in the fundamental options of scoping, phasing, sequencing, sourcing, procurement, contracts etc. Also by considering projects with programmes and portfolios for relationships, consistency and effectiveness to optimise sustainability results.
- **Benchmarking for your sector / industry / location** – what is good practice? what is best practice? what is cutting edge?, how is performance to be measured?
- **Legislation - local, national, regional** - by identifying the current legislation and standards, how to comply and whether to exceed or avoid. Also future trends during project, at handover, in longer term.
- **Financing – to suit your project** by devising the business benefits; by securing monetary incentives and grants; by avoiding taxes, penalties and charges.
- **Design Proposals on your projects** – by stimulating designs which creatively respond to statements of requirements, statutory standards and good practice for sustainability. And then checking or auditing achievements.
- **Specifications for your project** – by conveying through the specification writers and checking that components and assemblies are sourced and delivered in sustainable ways with proof.

- **Change Decisions** – by addressing sustainability aspects when change is under review, for example when making tactical decisions that the change review includes considered value engineering and not just short term cost driven capital expenditure effects, financial value, urgency or expediency.
- **Delivery Stage on your project** – by reviewing, updating, confirming, promoting and implementing the predetermined project sustainability arrangements, corporate standards and good practice – including waste avoidance, packaging, sequencing efficiencies. Deliver the goods. Search for additional benefits.
- **Management Arrangements you can adopt** – by adopting effective project managerial and operational arrangements covering logistics, meetings, communications, consumables, re-use and recycling – at collective, corporate and individual citizen levels.
- **Sustainability Communications as a theme** – by the team conveying the sustainability aspects of the project throughout its duration to stakeholders including to end-users / occupiers at handovers through documentation, briefings and follow up support.

Further approaches include:

- Consider Sustainability at every aspect of the *APM Body of Knowledge*
- Incorporate sustainability into every stage throughout the project lifecycle – which in itself will depend on the project type and sector.

The Individual Contribution

Whether or not sustainability forms part of a project's outlook or culture, or forms part of a job description and role, there are still opportunities for everyone to contribute as citizens of this small globe. The issues and choices are complex, more and more information is being added to the debate – but common sense is a good standby. “What is **your** carbon foot print? And for how you manage **yourself?**” – energy conservation, paper savings, green travel arrangements, avoiding waste, best use of resources, existing technology, eliminate dirty costs, etc.

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Conclusion

- The world may be on a fatal collision course with itself – or it may not
- The world's inhabitants may be able to avoid or reduce the likelihood and consequences of such a collision – or they may not.
- The world's citizens may turn to and challenge project teams and managers of projects to make a difference through **specific** projects and across **all** their projects – the citizens probably will.
- The managers of projects and their project teams may be ready to respond to these challenges – some will, some will not.
- The efforts of the managers of projects and project teams of specific sustainability projects may make a difference in saving the planet – we hope so.
- The managers of all projects and programmes could choose to prepare themselves for these challenges – or could not.
- This preparation could include having a menu or checklist of how to bring the greatest worldly sustainability contributions through their projects – good luck.

References:

APM website sustainability section covering books, magazines, news, media, etc.



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Tom Taylor is a founding partner of Buro Four - an eminent project management outfit based in UK - see www.burofour.co.uk. He is a Certificated Project Manager, a former chairman and current vice President of Association for Project Management (APM). He was awarded the inaugural President's Medal by APM in 2007. - see www.apm.org.uk for information about APM. Tom has over thirty years experience in front line project and programme management including the Centenary Project for Royal Academy of Dramatic Art (RADA), the Cable and Wireless College, National Tennis Centre for Lawn Tennis Association (LTA) and with many other types of projects, contract forms and teams. He is an active manager, advisor, consultant, lecturer, speaker, author and occasional broadcaster - with an enthusiastic, knowledgeable approach. His recent publications for project management practitioners, through dashdot, include "Characteristics of Effective Project Managers", "GMPM and other modern afflictions affecting project managers", "Management in Practice" and "How to Select the Right Project Manager" - which have touches of good sense and good humour. He is continuing to research and promote further pragmatic topics including PM's contributions to Sustainability, the Environment and Green Issues. Tom is a principle of dashdot - see www.dashdot.co.uk and can be contacted at ttaylor@dashdot.co.uk.
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