

# Your Toughest Project – Ever

By Bill Flury

## Introduction

You have just been offered the opportunity to be the Project Manager of a new project. That's the good news. The bad news is that it is likely to be the toughest project you will ever undertake. When you learn what's involved you'll see just how tough it will be.

## What Makes a Project Easy?

Before we get into the details of this toughest project, take a moment to recall some of the things that make projects easy. While every project has its own set of challenges, your experience has shown you that projects tend to be easier (i.e., less tough) when you have had:

- ✓ Top level involvement and support,
- ✓ Few uncertainties and risks
- ✓ Clear, stable requirements,
- ✓ Time to do careful planning
- ✓ An achievable schedule
- ✓ Options to recover (i.e., UnDo or ReDo) when you make a mistake.

If you were being offered a project with all of these “easy” characteristics you would likely be very pleased to take it on. Unfortunately, the new project you have been offered has **NONE** of those characteristics. That's what makes it the “Toughest Project”.

## Your Project

Your project is to relocate an old organization that has been operating in one place for a long time. Over the last several years it has found the need to rely on additional staff to provide an ever-increasing number of special support services from many different sources. It is clear that the need for these services is likely to continue to grow substantially in diversity and intensity.

It has also become very clear that the expense and coordination of the many, required services is too burdensome now and will only increase in the future at this location. The organization needs to move to a new location where the required services can be obtained in a better coordinated and less expensive way. There are many options available for making this transition.

If you accept the challenge, you will have to select the best option for the future location and manage all aspects of the transition from the old to the new environment.

*What could be hard about that?*

## The “Organization”

If this was a normal business organization, it could be a pretty straightforward job. However, this one is different. The “organization” consists of a couple of senior citizens who have reached a point where they need to make a big change in their lives. These might be your parents or other older relatives who are physically, financially, or socially at risk in their current home. They need to move into a situation that will comprehensively and consistently provide the support they need as they continue to age.

As project manager, you will start by finding suitable new options and helping your seniors agree to and commit to the move. After that your activities will focus on preserving things that they will need in the new environment, disposing of everything they won’t need (including their current house or apartment), repackaging their lives to fit the new situation, getting them there in good shape and helping them settle in and thrive in their new environment.

It sounds like a pretty straightforward project, but it isn’t. There are many aspects that combine to make it the hardest project you will ever tackle.

## No Top Level Support

There’s an old cartoon strip about Boy Scout, eager to do a good deed, insisting on helping an old lady go across the street. They make it across the street safely. Then, she thanks him and asks to go back --*because she really didn’t want to go in the first place*. That’s the first hard part.

The main subjects of your project, the seniors for whom you are trying to do a good deed by getting them into a better environment, really don’t want to go. They cling to an outdated vision of going to *The Old Folks Home*, a nursing facility where residents receive food and shelter and lead a very limited life until they die.

Today, there are many new options for active seniors to get the additional support they need as they become less able to deal with the various aspects of their lives. The feared “Home” has now been replaced by a continuum of choices that includes:

- Independent Living for residents who don’t need personal assistance
- Assisted Living for people who require a little help with the activities of daily living
- Skilled Nursing and Rehabilitation services or Memory Care

You need to do your homework to find what you think will be the most acceptable new home for your seniors. There are many factors involved. First, you need to obtain a good assessment and forecast of your seniors’ needs. Then, you need to gather information on the possible choices (e.g., services provided, location, affordability, facilities).

After you explore the options you will need to present them to your seniors, overcome their misconceptions about the options and help them arrive at a decision on when and where to relocate. This may be hard to achieve but it is a critical first step.

*You will need to find a way to achieve consensus with everyone equally dis-satisfied (or satisfied) with the final result.*

What makes this particularly hard is the fact that there are many other stakeholders involved. Children or other relatives in this operation are likely to have strong feelings also – some in favor of making the move and some against. Emotions can run high. There will be issues with where the seniors should go (i.e., who should they be near?), what should happen to their current home, what should be done with the items they can’t take with them, and so on. The differences among all the participants can be more complex than Middle East peace talks. You will need to find a way to achieve consensus with everyone equally dis-satisfied (or satisfied) with the final result.

How will you do that? And, here’s a follow up question. *How will you mitigate the problems if consensus cannot be achieved?*

## Uncertainties and Risks

If there was no uncertainty or risks this project would be easier. However, this project involves uncertainties and risks in real estate and investment values, and the health of the principal subjects.

## Financial Uncertainties

**Housing:** Let’s start with the fact that the new situation must be affordable for your seniors. What will the new home cost? How will they pay for it?

They are likely to have lived in their home for some time. What will their house sell for? Will they have some equity to use to help them purchase or rent their new abode? Will they make or lose money on the sale? Will they need to dip into savings to afford the new place?

**Living Expenses:** Your seniors will ideally have some consistent regular income (e.g., Social Security, pensions). They may also have other investments and IRAs that could be tapped for living expenses. The values of these varies and is a source of uncertainty.

Some expenses they now have will go away (e.g., home maintenance, lawn care)? What expense are likely to be less (e.g., real estate tax, home owner's insurance, utilities)? What expenses will stay the same or possibly be greater (e.g., condo fees, meal plans)?

You will need to nail down all of these current and future financial questions about capital and operating expenses before you can address the next question – Will they be able to afford to continue at the new location despite normal fluctuations of the economy?

What will happen to their investments? Will the results of their home sale add to or subtract from their retirement investment pool? What income can they expect to get from Social Security, IRAs, pensions, and other investments through good times and bad?

**Performance Uncertainty:** Will the new situation be satisfactory and provide all the needed services? Will your seniors' health hold up through the process? Will your seniors need to have additional help or transportation assistance? There is a risk of surprise costs (e.g., special assessments, staff annual tips). How will these affect your seniors' financial and psychological situation?

## Clear, Stable Requirements

As you progress through the project you will be threading your way through a minefield of rules. The rules shape the requirements. Everybody has rules and they often conflict. Retirement communities have rules on how old one has to be and how physically able and well people must be to enter. Each state has rules about retirement community operations and care. Real estate rules cover the sale or disposal of the current domicile.

While disposing of items during downsizing you will find that consignment shops, donation organizations and even trash disposal organizations all have their own rules. Some will come and pick up donations – if they are left outside in boxes or bags. Some require that you drop off the items during certain times. Some will come into the home to remove larger items and some won't. In some locations mattresses can be donated. In many cases they must be set out as large trash to be picked up.

Studies have shown that the typical home contains more than 10,000 items and there are rules for every type of item. Just hope you are not trying to dispose of once-prized items that contain prohibited materials (e.g., ivory carvings, eagle feathers).

## Time to Do Careful Planning

As can be seen from the above list of uncertainties, requirements will need to be updated every day and re-planning will be a constant. The pace of action on this project is fast. Everything changes every day and there is constant pressure to re-act to crises here and now rather than to take time to anticipate potential problems and plan to deal with them in an orderly way.

## An Achievable Schedule

When will the new place be available? When must your seniors take up residence and/or start paying for it? When will the old home sell? How will you handle any gaps in timing?

It looks easy at first. Find the new environment and secure it. But there may be a waiting list, or a suitable or desirable apartment or condo might not be available until someone relocates (e.g., moves away or dies). You also have to find a way to pay for the new place. That takes us back to the problem of getting rid of the old home. Put more simply, unless you have enough money in the budget to afford both you will have to get the funds from the old place to pay for the new one. How long will it take to set up bridge financing?

*You can't change the past, so it's best not to dwell on it. There's no going back.*

## Options to Undo and ReDo

What's done is done! This phrase hasn't changed one bit since Shakespeare wrote it down. It still means exactly what Lady Macbeth meant. You can't change the past, so it's best not to dwell on it. There's no going back.

House sales and purchases are final and can only be reversed at great expense of time and money. Items sent away during downsizing are gone, sold or donated and are not recoverable. Household goods that have been retained (*maybe too many*) have been moved into the new digs and your seniors have moved in.

So, now it's time to move forward and think about what to do next instead of focusing on what's already happened.

But, there's still one more part – perhaps the toughest part of the toughest project

## Closing Out the Project - Notifications

You have a lot of organizations and people to notify. Today, that can be an extremely complicated and demanding task. First, the sheer number of notifications can be staggering. Here's a list that will give you some idea of how many you will be likely to find. (See Figure 1)

**Figure 1**  
**How many Notifications Will You Have to Make?**

<b>Utilities</b> <ul style="list-style-type: none"> <li>• Electric</li> <li>• Gas/Oil</li> <li>• Water</li> <li>• Garbage/Trash</li> <li>• Telephone - Landline</li> <li>• Telephone – Mobile</li> <li>• Cable TV</li> <li>• Internet</li> </ul>	<b>Financial &amp; Personal Accounts</b> <ul style="list-style-type: none"> <li>• Banks</li> <li>• Loan Institutions</li> <li>• Credit Card Companies</li> <li>• Department Stores</li> <li>• Insurance Agencies</li> <li>• Pension Plan</li> <li>• Rewards Programs</li> <li>• Professional Associations</li> </ul>	<b>Subscriptions</b> <ul style="list-style-type: none"> <li>• Newspapers</li> <li>• Magazines</li> <li>• Mail Order Catalogs</li> <li>• Book Clubs</li> </ul>
<b>Services</b> <ul style="list-style-type: none"> <li>• Physicians</li> <li>• Attorney</li> <li>• Lawn/Garden Services</li> <li>• Housecleaning Service</li> <li>• Veterinarians</li> <li>• Accountant/Tax</li> </ul>	<b>Government</b> <ul style="list-style-type: none"> <li>• Post Office</li> <li>• Social Security</li> <li>• Income Tax: Federal State</li> <li>• Pension Benefits</li> <li>• Voter Registration</li> <li>• Motor Vehicle Car</li> </ul>	<b>Other On-Line Accounts</b> <ul style="list-style-type: none"> <li>• e-mail accounts</li> <li>• AAA</li> <li>• AARP</li> <li>• Amazon</li> <li>• Google</li> <li>• Social Accounts (Facebook, etc.)</li> </ul>

In the days before the internet and the digitalization of most business systems, the notification process was pretty simple. Now it is much harder to do. For each, you will have to know the currently recorded information, the way to make the change, (e.g., by phone, e-mail, letter) and, if necessary have the passwords or personal identification available to tell the organization that you are authorized to make the change. (I said this was really tough. Do your seniors have good files where you can find all this?)

In the notification process, you will rarely be dealing with real people. You will mostly be dealing with phone robots, widely varying web sites and arcane government forms. Each will require different information.

Some of the attempted notifications will fail and you will find out about this weeks or months later by continuing to see bills for services thought to be concluded and by seeing mail that has been forwarded to the old address. Here is a case where what's done is not done and it must be done again, and again, until it stops.

## See, it is Really Tough

None of the easy factors are there. The seniors don't really don't want to go and the children have a lot of conflicting ideas. So much for management support. The number of uncertainties and risks is mind-boggling. There will be surprises every day and it will be hard to set aside enough reserve to mitigate them.

You will spend hours, days, maybe weeks adjusting your requirements to avoid the hidden dangers in the rules minefield. With so many balls in the air at one time your planning will have to be done in between catches – and there won't be much time there.

Your schedule will be set by others, (e.g., realtors, sales people, movers) and their schedules will all be rigid and conflict. You will live with all your mistakes and their consequences with no do-overs.

## Advice from an Expert

Theodore “Rough Rider” Roosevelt was famous for taking on and successfully completing tough projects (e.g., finishing the Panama Canal, exploring the River of Doubt). His advice to those who take on tough projects is **“Do what you can, with what you have, where you are”**.

If you agree to accept the offer to manage **“The Toughest Project”**, you should heed Teddy’s advice. Work hard, be aware, be flexible and be ready to deal with the situation as it evolves.

**Good Luck!**

## About Forward Momentum, LLC

Forward Momentum, LLC is a woman-owned small business (EDWOSB/WOSB) and Project Management Institute® (PMI) Registered Education Provider (REP). Since 2000, Forward Momentum’s real-world experiences, coupled with practical application of theory, have helped realize project management, leadership and learning potential within to commercial, government and non-profit organizations. As a boutique firm, we pride ourselves in understanding your business, analyzing your learning and development needs, and driving efficiencies and growth through consultative engagement.

Let us show you how our approach can optimize your learning experience, improve your processes or empower your team by emailing [dobusiness@forwardmomentum.net](mailto:dobusiness@forwardmomentum.net).

Visit [www.forwardmomentum.net](http://www.forwardmomentum.net) or [www.linkedin.com/company/forward-momentum](http://www.linkedin.com/company/forward-momentum) to learn how our experience can maximize your bottom line.

## About the Author

Bill is an experienced project manager with an enviable record of successfully completing 85 major projects all of which ended on time, within budget and with very pleased clients. In this article, Bill is reporting on his first-hand experience with managing “The Toughest Project”. He and his wife, Mary, are the reluctant seniors in the story who have now successfully completed their move from their home of 54 years to a senior condo community with continuing care options.

This article is the first part of a book that Bill is working on to provide more details of what to expect when you find that you are being offered the opportunity to take on “The Toughest Project” for one or more of your senior relatives or friends. He wants to help you be prepared for this kind of project which is becoming much more frequent as our population ages.

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Bill has published two books with practical advice for project managers. Both books are published by Amazon Create Space and are described at:

<https://www.amazon.com/author/billflury>

***Draw What You Do: A Practical Approach to Process Improvement***, describes how you can improve the way you work by drawing and sharing a picture of what you and your co-workers do and working with them to find ways to do it better.

**WYSIWYG Tales: See What You Do**, presents real-life stories from Bill’s experience in helping clients see and improve their work processes.