

# Conducting an assignment

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## *Managing the assignment*

An assignment is a project and project management techniques should therefore be applied. The main activities required are:

**1 Define the terms of reference**

These should be clear and fully understood by all concerned.

**2 List the outcomes**

These should state how the terms of reference will be met and in what form (for example, report, presentation, progressive implementation).

**3 Establish the programme**

This can be expressed as a bar chart or, for complex assignments, a network could be drawn up.

The programme requires:

- a list of the major activities in sequence
- a breakdown of each major activity into subsidiary tasks
- an analysis of the interrelationships and interdependencies of major and subsidiary tasks
- an estimate of the time required to accomplish each activity and task
- a resource plan for making available the consultancy skills required at each stage of the assignment
- a time-budget for the assignment which should be in accordance with the proposal, and which budgets time on a weekly basis for each activity and task
- a cash flow forecast, estimating the inflow of fees and the outflow of expenses.

**4 Draw up a consultants' brief**

Additional consultants or subcontractors working on the assignment should be briefed on what they are required to do, how and by when.

**5 Hold 'milestone' or progress meetings**

The timing, purpose and membership of progress meetings should be determined.

**6 Monitor progress**

Arrangements should be made to monitor the progress of the assignment

against the terms of reference, the programme and the time budget. Anything extra that was not in the original proposal and terms of reference should be brought to the attention of your client and his/her agreement in writing obtained for any additional costs that may be incurred or any change in the timetable. The records needed for the purpose of controlling the progress of an assignment are:

- An assignment diary: this should be completed weekly by each consultant on the assignment, recording the activities carried out during the week (cross-referenced to the proposal), the time spent on each activity, and progress against the budget. An example of such a diary is given in Figure 16.
- An assignment control sheet: this should list the activities to be carried out and give the budgeted time for each one and the programmed completion date. The time spent on any activity is entered weekly against the budget for that week. The total time to date allocated to the activity is recorded for comparison with the total time budget (see Figure 17).

**Figure 16**  
Assignment diary

ASSIGNMENT DIARY						
Client						
Type of assignment						
Assignment responsibilities of consultant						
Diary for week ending .....						
Date	Activity	Time spent	Progress			Expenses incurred (specified)
			Time budget	Time to date	Complete	
Signed (consultant) .....		Date .....				
Countersigned (consultant in charge) .....		Date .....				

Figure 17 Assignment record sheet

ASSIGNMENT RECORD SHEET						
<b>Client Details</b>						
Name .....						
Address .....						
Telephone no .....						
Name of contact (and address and telephone number if different)						
<b>Assignment details</b>						
Type of assignment .....						
Consultant in charge .....						
Other assigned consultants						
names		from		to		time (days/hours)
Date proposal made .....			Date proposal accepted .....			
Date started .....			Date completed .....			
<b>Fees and times</b>						
	Fee rate	Estimated time	Actual time	Estimated fee £	Actual fee £	Actual expenses £
Consultant in charge						
Other consultants						
	/					
Total fees received			£ .....			
TAX			£ .....			
Total value of expenses received			£ .....			
<b>Comments</b> (including follow-up action)						