

**BC Wildlife Federation:**  
**Issues Management Manual**

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## **1.0 - Purpose**

Issue management is the process of identifying and resolving issues. Problems with staff or suppliers, general complaints, material shortages – these might all have a negative impact on your operations. If the issue goes unresolved, you risk creating unnecessary conflicts, delays, or even failure to produce your deliverable.

Throughout the lifecycle of a project, unplanned events or unexpected problems will arise that need to be resolved in order to complete the project. If not resolved, an issue will impact any one or a combination of project cost, delivery date, or quantity over deliverables. In an extreme instance, an issue can prevent the completion of a project.

The purpose of the issues management plan is to:

Provide a means of recording issues as they arise or for recording highly probable risks

Analyze the issue to determine what the problem is, how it will impact the project, what the resolution for the issue is, and what the timeframe for resolving the issue is

Provide a means of tracking issues so that they are all closed out before final delivery of the project

## **2.0 – Common Source Issues**

Common sources of issues include:

- Management (faulty assumptions, strategies, approaches)
- Staff (lack of appropriate skills, experience, and/or knowledge)
- Environment (inadequate support or infrastructure)
- User relations (active user involvement is vital)
- Credibility (unrealistic expectations that cannot be met)

- Productivity (inability to meet realistic demand)
- Lack of Quality associated with deliverables
- Deliverables or defined processes not meeting stated objectives

### **3.0 – Issues, Risks, and Scope Changes**

Issues and risks are not quite the same thing. However, the exact nature of both is largely unknown before you begin. With risks, you usually have a general idea in advance that there's a cause for concern. An issue tends to be less predictable; it can arise with no warning. It's important to identify risks before the project begins. You can then develop a plan to manage those risks proactively with solutions that you've already thought through and prearranged. However, when it comes to issues, you have to deal with them as they happen. Issue management, therefore, is a planned process for dealing with an unexpected issue – whatever that issue may be – if and when one arises.

Some issues may require formal changed to the scope of the project in order for the issue to be resolved.

### **4.0 – Issues Management Roles**

All project members and stakeholders have the responsibility to be aware of the issue management plan and to clearly identify project issues. Any team member or stakeholder can identify an issue and log it on the issues and risk log.

#### **4.1 - Risk Identifier**

The risk identifier is specifically responsible for:

- a. Identifying the issue and providing as much information as possible

- b. Documenting the issue on the issues and risk log
- c. Assigning the issue to the project manager for review

## **4.2 – The Project Manager**

The Project Manager (PM) is responsible for reviewing all assigned issues and recording and monitoring the progress of all issues. The PM is specifically responsible for:

- a. Reviewing all submitted issues
- b. Monitoring the progress of all issues
- c. Reviewing the initial analysis performed by the functional team
- d. Determining which issues should be closed out
- e. Assigning issues to team members for action
- f. Scheduling work on issues
- g. Reporting issues to club directors

## **5.0 – Analysis**

### **5.1 – Strategy Formulation**

An organization can both increase its economic gain and minimize costs resulting from unproductive conflict and relationship damage by searching for advantages and points of leverage, either through continuing operations or altering them.

Strategy formulation should be based on strategic positioning to achieve objectives derived from the mission statements and organizational self-assessment. Mission statements are implemented by the formulation of objectives, the creation of strategies, and the use of programs to achieve the strategies. Issues management applies the strategic planning process to comprehend and voice the standards of responsibility that prevail in the community.

## 5.2 – P.I.R.T

All issues must undergo a PIRT analysis before an action plan for resolving the issue can be reviewed by the project manager and action items assigned. The PIRT analysis consists of:

**Problem:** What is the problem? This should be concise, but thorough assessment of the project

**Impact:** What is the impact to the project? This should include the impact of the problem on both the project

**Resolution:** What is the proposed solution? (Note that there will be a separate field for actual resolution)

**Timeframe:** When must the issue be resolved? In determining the timeframe of the resolution, the team must assess the stage of the work to be done, and dependent requirements, and the amount of work to be done

## 6.0 – Process

When an issue arises there are a number of things that should immediately be considered.

**Understand** – What is it that actually happened? Who/What has been effected? Was this an identified risk and if so, what was done already to mitigate it?

**Present & Collaborate** – Get the team together (as applicable) and give a recap of the issue, to make sure everyone is on the same page. Then ask for suggestions to resolve and consider new risks from the potential resolution.

**Decide, Communicate, & Act** – Once the resolution has been agreed upon, communicate that plan to your team & the customer, then act on the plan. Again, make sure you have an owner of the tasks.

**Update** – Once the issue has been resolved, circle back with the appropriate parties to confirm the issue has been resolved and new mitigation strategies to prevent a recurrence of the issue.

## 6.1 – Issues Management Log

- All issues encountered during the project should be logged on the issues log so that a record is maintained of the actions taken
- Is the responsibility of all team members to log team members and provide as much information as possible to ensure a timely resolution
- All raised issues must comply with the PIRT criteria (problem, impact, resolution, time frame). Although the person raising the issue may not have all the required information, they should record as much information as possible to allow a thorough analysis to be done

Maintaining a comprehensive issues management log to monitor your issues is an extremely important thing to keep on top of. Below is a list of categories that you can include in your issues management log:

- Issue type – Define the categories of issues that you're likely to encounter. This helps you track issues and assign the right people to resolve them. You could have broad descriptions like these:
  - Technical – Relating to a technological problem in the project.
  - Business process – Relating to the project's design.
  - Change management – Relating to business, customer, or environmental changes.
  - Resource – Relating to equipment, material, or people problems.
  - Third party – Relating to issues with vendors, suppliers, or another outside party.
- Identifier – Record who discovered the issue.

- Assignment/owner – Determine who is responsible for resolving the issue. This person may or may not actually implement a solution. However, he or she is responsible for tracking it, and ensuring that it's dealt with according to its priority.
- Timing – Indicate when the issue was identified.
- Description – Provide details about what happened, and the potential impact. If the issue remains unresolved, identify which parts of the project will be affected.
- Priority – Assign a priority rating to the issue. Here's an example:
  - High priority – A critical issue that will have a high impact on project success, and has the potential to stop the project completely.
  - Medium priority – An issue that will have a noticeable impact, but won't stop the project from proceeding.
  - Low priority – An issue that doesn't affect activities on the critical path, and probably won't have much impact if it's resolved at some point.
- Assignment/owner – Determine who is responsible for resolving the issue. This person may or may not actually implement a solution. However, he or she is responsible for tracking it, and ensuring that it's dealt with according to its priority.
- Target resolution date – Determine the deadline for resolving the issue.
- Action/resolution description – Describe the status of the issue, and what has been done to find and implement a resolution. Include the dates of each action.
- Status – Track the progress of the resolution with a clear label identifying the issue's overall status. Here's an example:
  - Open – The issue has been identified, but no action has yet been taken.
  - Investigating – The issue, and possible solutions, are being investigated.
  - Implementing – The issue resolution is in process.
  - Escalated – The issue has been raised to management or the project sponsor/steering committee, and directions or approval of a solution is pending.
  - Resolved – The resolution has been implemented, and the issue is closed.
- Action/resolution description – Describe the status of the issue, and what has been done to find and implement a resolution. Include the dates of each action.

- Final resolution – Include a brief description of what was done to address the issue.

(Please see appendix 8.1 for an example of an issues management log)

## **6.2 – Analyze Issue**

- The project manager is responsible for analyzing and monitoring the issues. No issues will be analyzed unless they have been recording on the log
- Analyzing the issue entails discussing the issue with appropriate members of the team, and recording the results in the issue log
- In conducting the analysis, the project manager may also consult with others to satisfy that the issue is valid

## **6.3 – Determine Action Plan**

- The project manager then works with the team to define the action items necessary to resolve the issue and agrees on these actions and their resolution dates with those who are assigned to resolve the issue. In some cases this may involve invoking a change request, via the Change Request process
- Responses to actions will be reviewed by the Project Manager and may cause further actions to be required. It is the responsibility of the Project Manager to ensure that it is clear at all times what action is to be taken and who has the responsibility for managing the item. This information is recorded in the Issue Log

## **6.4 – Resolve Issue**

- The individuals to whom action items are assigned are responsible for following up and ensuring the issue is resolved within the agreed timeframe.

## **6.5 – Monitor Issues**

- Issues must be reviewed as a regular item in the weekly status/review meeting. During the weekly meeting only the relevant issues will be discussed
- There will be cases where resolving an issues requires a change to high level scope, delivery date or cost. In these cases the issue may require generating a Change Request for consideration prior to implementation action being taken
- As a result of completed actions or other reviews, the project manager must update the status of the issue

## **6.6 – Escalation of Issues**

- If the issue is not resolved by the resolution date, it will be presented for resolution to the higher decision making team/body.
- An issue may be escalated to the project team at any time if it becomes clear that the issue has implications for the program as a whole. This may occur at the outset if the project manager recognizes that the issue has implications across the program, or at any later point.
- The project manager may also involve the Key Stakeholders and/or Project Sponsor at any time if she/he is unable to resolve the issue within his/her own span of authority although the issue remains at project level.
- When issues are escalated to the Key Stakeholders and/or Project Sponsor, sufficient research and recommended resolutions must be documented along with the issue to enable the body to make an informed decision

## **7.0 – Conclusions**

Having a plan on how to deal with complaints before they occur is an ideal tool for any range to implement, and should be taken very seriously. Conducting a SWOT analysis can help in managing what your range's current situation is in regards to positives and negatives.

When speaking with those who are complaining about your shooting range, ensure that you are speaking professionally and courteously at all times. Standardizing responses and letting them know how seriously you take their issue can benefit the relationship between you and the issuer immensely. Filling them in on your pro-active approach to issues management displays good intentions and a commitment to maintaining a good relationship.

### 8.0 – Appendix - Example Issues Management Log

Date Logged	Identified by	Issue	Background / Progress	Target Resolution	Status	Priority
Issue date	Name of issue identifier	Describe the issue	Progress in resolving the issue / escalation history if necessary	Target date for resolving the issue	Open / Closed / Monitor	1 - Critical 2 - High 3 - Medium 4 - Low


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