

# Project Management

## Project Roles and Functions

### Executives/Sponsors

The basic functions of the executive are to support organizational alignment of strategy and operations. Executives often utilize tools and techniques such as portfolio management to identify, prioritize, authorize, manage, and control projects, programs, and other related work to achieve specific strategic business objectives. From this perspective, portfolio management also includes selecting, managing, and evaluating the inventory of proposed and current investments that utilize organizational resources.

As it relates to project management executives often interface very closely during the early phases of the project's life cycle; during the initiation and planning phases, and less during the later phases unless needed. This is accomplished in such a manner that ensures maximum value from the limited availability and efficient utilization of organizational resources. The objective being to optimize organizational and investment performance by aligning programs and projects with strategies, then managing them holistically through the diligent application of practices such as:

- Strategic planning
- Investment analysis
- Demand and change management
- Investment, program, and project management
- Resource management (HR, finance, capacity, etc)

### Project Champions

A project champion (business owner) is the executive who serves as the primary customer and advocate for a project. They are granted authority to use organizational resources for the completion of the project they're championing and act as liaison between executives and the project team.

The project champion is responsible for identifying the business needs and performance measures to be satisfied by the project; providing funding for the project; establishing and approving changes to cost, schedule and performance goals; validating that the project initially meets business requirements; removing obstacles to progress; clarifying competing

priorities; ensuring that as the project progresses it continues to meet business requirements; and reporting status to top management.

### Project Managers

The basic functions of the project manager are to apply organizational methodologies to plan, coordinate, and integrate activities and resources across functional lanes of responsibility necessary for successfully delivering project outcomes. As a result, the project manager is most influential and responsible for project success. This role is also one of the most challenging within an organization.

Individuals performing this role must have strong communication and interpersonal skills. They should be familiar with the organization's methodology, practices, policies, and structure in which they work and capable of balancing the management and communication needs between project teams and the interrelationships between those teams and functional organizations, senior management, and both internal and external customers.

### Core Project Team

The core project team is made up of key individuals often associated with the project from start to finish. This team defines and plans the project and is vital to its overall success. As the project progresses they may bring on additional key personnel to accomplish planned project activities and produce deliverables.

### Functional Managers

The basic functions of the functional manager revolve around their specific lane of functional responsibility (i.e., development, documentation, testing, implementation, etc). These individuals are usually experts in their functional disciplines and often oversee the very resources project managers rely upon to accomplish project activities. As a result the relationship between functional and project managers is very close and vital to project success. Once project requirements have been identified,

project manager's work closely with various functional managers to identify capabilities, capacities, and availability of required resources. It becomes the functional manager's responsibility to outline for project managers how such activities will be completed and to allocate sufficient resources to accomplish those activities. This information is then translated by the project manager into a project schedule activity outlining work and duration.

The role of a functional manager is demanding. Functional managers are often under tremendous pressure from unlimited work requests coming from all areas of an organization, areas in which they have little influence. Functional managers must juggle these requests and the competing demands they place upon their pool of resource responsibility. Requests are more often than not a high priority and are usually accompanied with predetermined deadlines of which the functional manager may not have had any influence in determining.

#### **Critical Partners**

Critical partners are functional managers in the areas of: EA, Security, Acquisition Management, Finance, Budget, Human Resources, Section 508, CPIC, and Performance. They are considered expert participation roles in project reviews and governance decisions to ensure compliance with policies in their respective areas and to make timely tradeoff decisions where conflicts arise during the planning and execution of an investment. Because organizational structures vary the expertise for these critical partner roles may be fulfilled from a mixture of organizations, as appropriate. Project managers work with the critical partners to integrate their knowledge to the core project team and act as a reviewer of their particular knowledge area.

#### **Functional Employees**

Once a functional manager commits to a work request, functional employees step in and play a vital role in ensuring project success. Under the supervision of a functional manager, this role is expected to accept responsibility for accomplishing assigned tasks and deliverables, complete this work as early as possible, provide status updates on the progress of such work, inform the appropriate stakeholders if problems arise, and to share relevant information with the rest of the project team.

#### **Stakeholders**

Stakeholders are people, groups, or organizations, both internal and external, that have a vested interest in, or can impact the outcome of, the project. Each stakeholder plays an essential role in

the project's life cycle and is integral to its success. The role of each stakeholder may vary throughout the life cycle and include, but are not limited to executives, champions, project managers, critical partners, governance, business owners, project teams, sponsors, and customers.

For more information on the CDC UP please visit the CDC UP website at <http://www.cdc.gov/cdcup/>. ■

### **Project Management Community of Practice**

#### **2010 PMCoP Meeting Calendar**

- *December 10, 2010*  
*Managing Projects in a virtual World*

#### **2011 PMCoP Meeting Calendar**

- *January 28, 2011*
- *February 25, 2011*
- *March 25, 2011*
- *April 29, 2011*
- *May 27, 2011*
- *June 24, 2011*
- *July 27, 2011*
- *August 26, 2011*
- *September 30, 2011*
- *October 28, 2011*
- *December 02, 2011*

For more information on the Project Management Community of Practice visit the PMCoP website at <http://www2.cdc.gov/cdcup/library/pmcp/> ■

### **CDC Unified Process Presentations**

The CDC UP offers a short overview presentation to any CDC employee and/or contractor group, upon your request. Presentations are often performed at your facility, on a day of the week convenient for your group, and typically take place over lunch structured as 1-hour brown bag/lunch-and-learn style meeting.

Contact the CDC Unified Process at [cdcup@cdc.gov](mailto:cdcup@cdc.gov) or visit <http://www.cdc.gov/cdcup> to arrange a short overview presentation for your group. ■

### **Contact the CDC Unified Process**

The *CDC Unified Process Project Management Newsletter* is authored by Daniel Vitek, MBA, PMP and published by the Office of Surveillance, Epidemiology, and Laboratory Services.

For questions about the CDC UP, comments regarding this newsletter, suggestions for future newsletter topics, or to subscribe to the CDC UP Project Management Newsletter please contact the CDC UP Team at [cdcup@cdc.gov](mailto:cdcup@cdc.gov)

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