



NATIONAL
RURAL HEALTH
RESOURCE CENTER

600 East Superior Street, Suite 404 | Duluth, MN 55802 | Ph. 800.997.6685 or 218.727.9390 | www.ruralcenter.org

Project Management

Sally Buck, MS

Chief Executive Officer

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Purpose

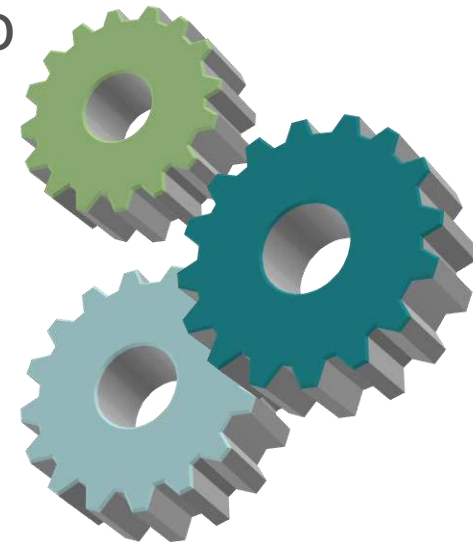
The National Rural Health Resource Center is a nonprofit organization dedicated to sustaining and improving health care in rural communities. As the nation's leading technical assistance and knowledge center in rural health, The Center focuses on five core areas:

- Performance Improvement
- Health Information Technology
- Recruitment & Retention
- Community Health Assessments
- Networking



What is Project Management?

- Discipline of planning, organizing, motivating and controlling resources to achieve specific goals
- A project is temporary in that it has a defined beginning and end in time, and therefore defined scope and resources





Project Management Myths

- Immediate results in all projects coming in on time and within budget
- Only people who will actually be project leaders need to learn about project management
- There is “no time for planning”



Project Management Myths

- It is mainly people management
- It makes no sense to use common processes in an organization since projects are unique
- It just adds complexity



Effective Project Management

- Define the desired outcome
- Plan! Don't just dive right in
- Use tools
 - Charter, timelines, communication matrix, closeout discussion
- Identify risks and assumptions up front
- Monitor the schedule and budget

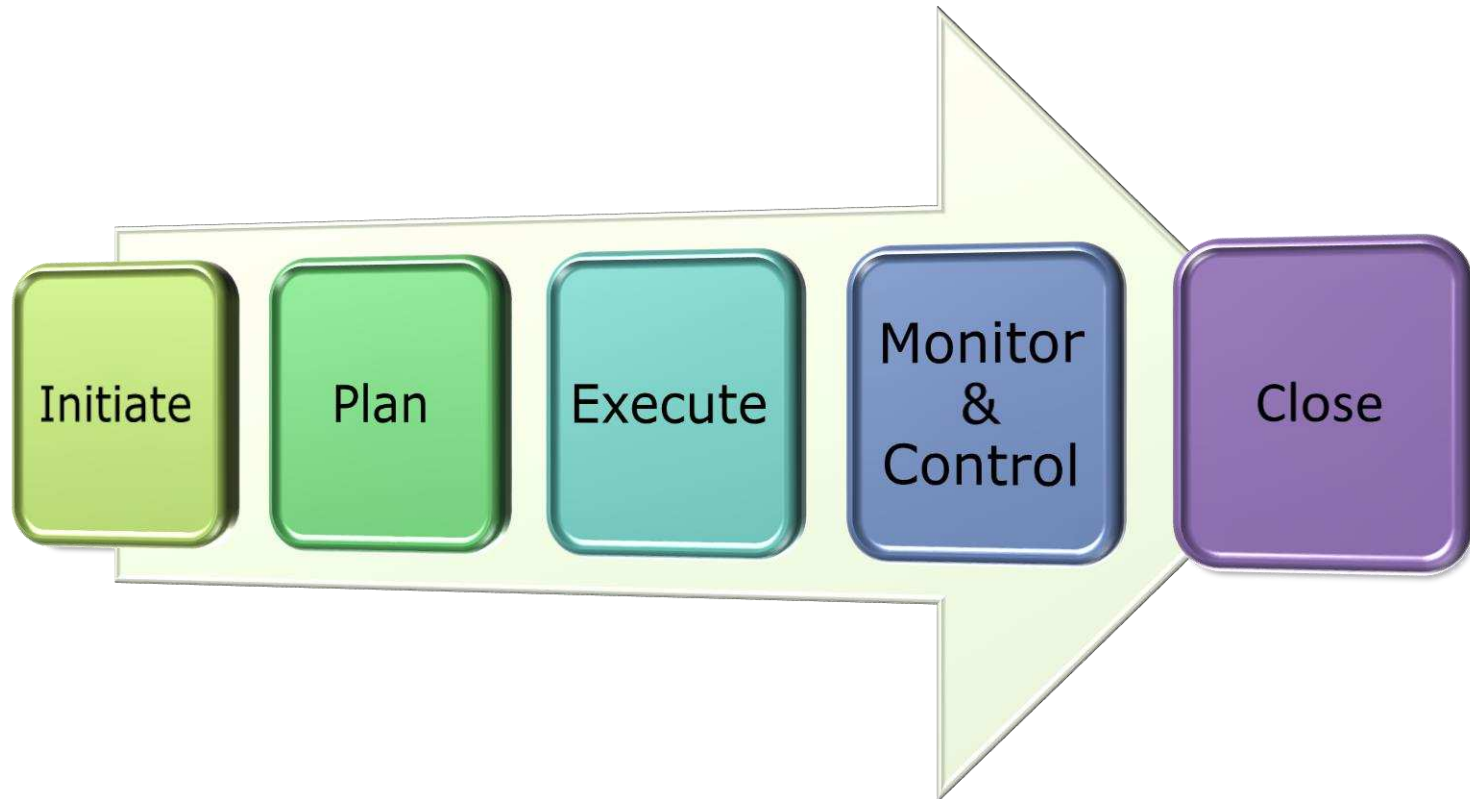


Effective Project Management

- Solicit approval and buy-in where needed before beginning
- Communicate and document roles and responsibilities
- Watch for scope creep – adjust only as needed
- Document outcomes and closeout the project with documentation



Phases of Project Management





Phases

1. Initiate

- Authorizes the overall project
- Objectives and scope defined
- Responsible parties identified
- Deliverables identified
- Project Charter developed and approved



Phases

2. Plan

- Course of action to define and refine objectives
- Timelines, roles and responsibilities, communication matrix and other tools developed and communicated

3. Execute

- Resources, people and budget coordinated
- Project plan carried out



Phases

4. Monitor & Control

- Ensure not only that project objectives are met, but also that corrective action is taken should a problem arise
- Performance, risk and controls monitored
- Schedule and deliverable attainment monitored
- Adjustments to scope of project made if necessary (watch for scope creep)



Phases

5. Close

- Project is finalized and brought to an orderly end
- Contracts closed out
 - Any remaining open items are resolved and the contract is settled



Phases

5. Close

- Administrative items closed out
 - Staff debrief (closeout discussion)
 - Information gathered to formalize project completion
 - Lessons learned compiled for use in future projects

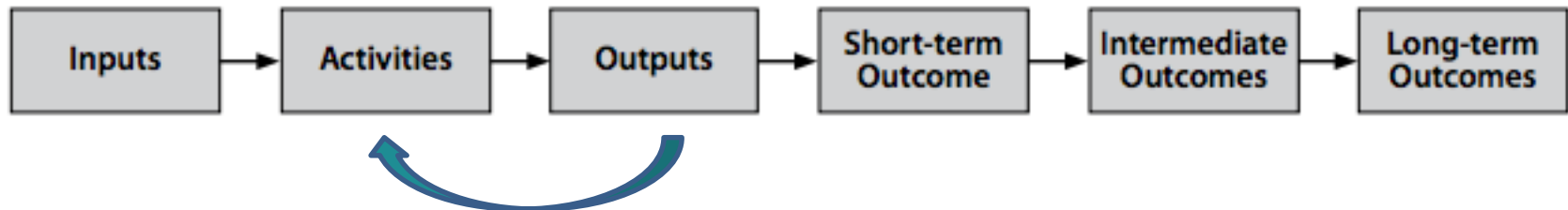


Evaluation and Project Management

- Use a planning framework to assist with developing interventions and evaluating programs
- Define expectations and plans to achieve them
 - Determine whether or not the results are related to what has been accomplished
- Identify expected results to help make program changes along the way

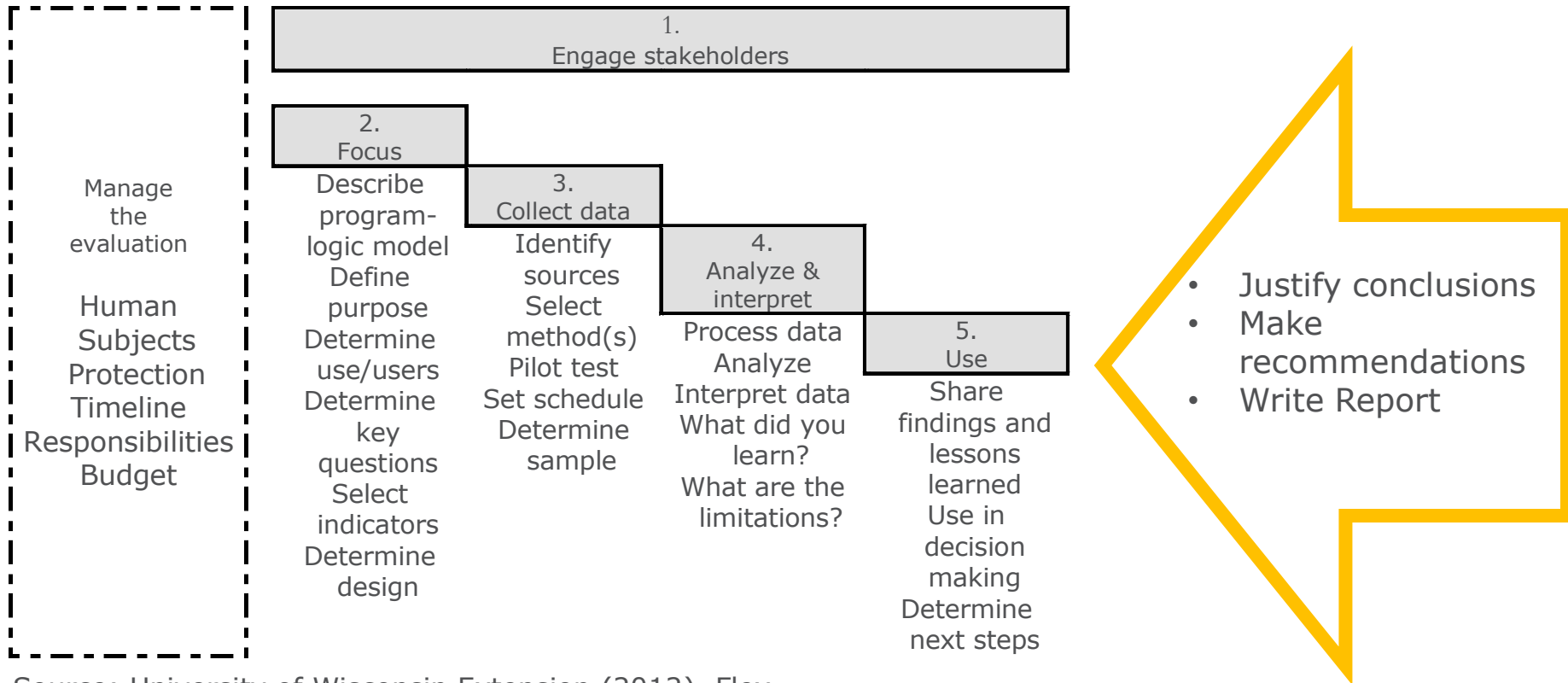


Evaluation and Project Management





Evaluation Steps





Scope Creep

- Uncontrolled changes
- Continuous growth
- Occurs when project isn't properly:
 - Defined, documented, communicated and/or controlled
- Creates risk, redundancies, inefficiencies, unintended outcomes





Project Management Tools

- Project Charter
- Timeline
- Roles and Responsibilities Table
- Communication Matrix
- Closeout Discussion



Project Charter

- One document
- Includes authorization, scope, purpose, objectives, project manager, resources, exclusions, constraints, assumptions, major milestones, budget
- Ideally signed by a sponsor for acceptance



Project Charter

- If content falls outside of the charter, it needs to be evaluated for inclusion
- Watch for scope creep
- Development of charter led by project manager

Project Charter

This Charter authorizes a evaluation for <<Organization Name>>.

Evaluation activities will commence upon approval of the evaluation plan and the requested resources to execute the evaluation by a Director. Included in the evaluation plan are to be: brief charter statement; timeline of major milestones; resources (including staff time and a budget if applicable); communications; risks and limitations; and project management.

Name of Project/Evaluation: _____

This Project falls under which of the following Programs (*check all that apply*):

The Organization (This project fits into all programs of the organization)

Program A Program B Program C

Other (please explain): _____

Scope Description: *What is the big picture? Develop a one to two sentence description of what you want to accomplish.*

Acceptance: *Who checks this off as done? Consider who in the organization can give approval to this project, and who has the authority to commit resources to it. What authority does the Project Manager have?*

Deliverables: *What steps get us to the Big Picture? Consider the things you will have to do along the way to get to the end goal. What is the timeline? What are the major milestones?*

Resources: *How much staff time is needed for this project? What type of staff is needed? (manager, specialist, administrative assistant, etc ...) Money? Technology resources? Additional supplies?*

Exclusions: *What are we NOT doing? Consider the related (or unrelated) things that others might assume you will take on because you are doing this project.*

Constraints: *What limits us? Consider things like time, money, regulations, unexpected change, audience, eligibility and content. While most of these are a given reality, try to think of issues specific to this project, this time frame, etc. that will constrain your project.*

Assumptions: *What resources do we think we have? Why is this project needed? Why is it unique?*



Timeline

- Lists the major milestones and large project steps in each phase
 - Does not include each individual action step
- Includes dates and outcomes
 - Can include expected and actual start and end dates
- Can include responsible parties

	Major Activities and Milestones	Deliverables	Start Date	Expected End Date
1. Initiate	1.1 Develop Charter 1.1 Submit Charter for approval 1.1 Milestone: Charter Signed/Approved	Project Charter for Evaluation	Aug 5	Aug 16
2. Plan	2.1 Determine evaluation team 2.2 Project team Kickoff meeting 2.3 Develop work plan for evaluation 2.4 Submit work plan for approval 2.5 Milestone: Evaluation design approved	Evaluation team list Evaluation team roles and responsibilities list Work plan	Aug 20	Aug 30
3. Execute	3.1 Establish regular team and sub-team meetings 3.2 Identify questions and outcomes measure data 3.3 Determine process and roles for data collection 3.5 Milestone: Data collected 3.6 Milestone: Data analyzed	Sources of data and formulas Targets Outcomes report	Sept 3	Feb 1 (First 6 months)
4. Monitor & Control	4.1 Update evaluation work plan as needed 4.2 Quarterly status reports developed 4.3 Milestone: Quarterly status reports submitted to project manager 4.4 Milestone: Semi-annual review with team	Quarterly status reports Semi-annual evaluation report	Aug 20	Mar 1
5. Close	5.1 Closeout meeting scheduled 5.2 Closeout meeting completed 5.3 Lessons learned and deliverables documented 5.4 Milestone: Final report submitted	Final report	Aug 1 Year 2	Nov 1 Year 2



Roles and Communication

- I thought someone else was taking care of that.
- I already did this. So did you. Duplication.
- I thought you were going to do this and now it's not done.
- You've taken over my work.
- You didn't complete your work on time and now my pieces will be late.



Roles and Communication

- Written roles and responsibilities up the ante on responsibility of individuals
 - Clearly written and agreed upon
- Roles and responsibilities must be communicated
 - Don't assume anything



Roles and Communication

- Responsible vs. accountable
 - Responsible – actually completing the work
 - Accountable – ensuring task completion
- All changes need to go through the project

Name	Role	Responsibilities
SORH Director	Leadership Team	<ul style="list-style-type: none"> - Approve or deny major project change requests as appropriate - Accept project deliverables - Determine resources available for project
Jan	Flex Coordinator	<ul style="list-style-type: none"> - Measure and verify project (making sure project doesn't go beyond the boundaries of the charter) - Facilitate change requests - Organize and facilitate scheduled project meetings - Communicate outcomes of project - Update project documents - Content expert: Flex, SORH, SHIP, CAHs and RHC technical assistance
Mary	Team Lead	<ul style="list-style-type: none"> - Measure and verify evaluation - Communicate outcomes of evaluation and project changes to team - Summarize activities from aspects of project and report to Program Manager and at project meetings - Seek change requests from Project Manager - Facilitate team level review process - Content expert: Flex Program, SORH, Outcomes analysis
Jacob	Team Member – Data	<ul style="list-style-type: none"> - Participate in defining resolutions to change of project - Make data changes and communicate them to the project manager as necessary, communicate changes to project lead as necessary - Mange metrics - Mange technical details - Content expert: TruServe, PIMs
Tom	Team Member	<ul style="list-style-type: none"> - Participate in defining change resolutions - Identify possible changes and communicate them to the Project Lead as necessary - Content expert: Finance



Closeout

- Important to compare final results to the original vision
- Completed in a structured way to keep conversation focused
- A great way to review lessons learned, impact of the effort, and future recommendations



Closeout Discussion Items

- Were the major milestones met?
- Problems/successes: What went well? What didn't go well?
- Impact: Did it matter? If so, how? If not, why not?
- Recommendations for future: Should we do this again? What to change?

	Major Activities and Milestones	Problem/Success: What went well, what didn't	Impact: Did it matter? If so, how? If not, why?	Recommendations Should we do this again? Changes?
1. Initiate	1.1 Develop Charter 1.1 Submit Charter for approval 1.1 Milestone: Charter Signed/Approved	No problems with internal support. Sponsor really saw the value in this.	Helped to have leadership support because it took a lot of time and other resources.	Yes, charter helpful in communicating!
2. Plan	2.1 Determine evaluation team 2.2 Project team Kickoff meeting 2.3 Develop work plan for evaluation 2.4 Submit work plan for approval 2.5 Milestone: Evaluation design approved	Needed team members were involved and adequate. Work plan hard to follow at first until format tweaked to work for all.	Work plan was adapted, otherwise difficult to use at first	Use new format
3. Execute	3.1 Establish regular team and meetings 3.2 Identify questions and outcomes data 3.3 Determine process and roles for data collection 3.5 Milestone: Data collected 3.6 Milestone: Data analyzed			
4. Monitor & Control	4.1 Update evaluation work plan as needed 4.2 Quarterly reports developed 4.3 Milestone: Quarterly status reports submitted to project manager 4.4 Milestone: Semi-annual review with team			
5. Close	5.1 Closeout meeting scheduled 5.2 Closeout meeting completed 5.3 Lessons learned and deliverables documented 5.4 Milestone: Final report submitted			



Exercise Scenario

Develop an evaluation project charter

- Your program needs to develop and implement an evaluation for the state Flex Program by August 30, 2014 to evaluate through August 30, 2015.
- Team A has an Public Health intern from the Master's Program to assist.
- Team B will conduct the evaluation internally and utilized TruServe.



Resources

Free project management templates

www.projectmanagementdocs.com

Source: Content in this presentation is modified from a webinar series by the Rural Wisconsin Health Cooperative, "Primary Project Management For the Busy Manager", October-November 2012.



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Sally Buck

Chief Executive Officer
National Rural Health Resource Center
600 East Superior Street, Suite 404
Duluth, MN 55802
(218) 727-9390 ext. 225
sbuck@ruralcenter.org
www.ruralcenter.org