Project Management – a practical approach

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Quorus
Introduction

- **Introductions**
- **Workshop overview**
  - What is it?
  - Why do we need it?
  - How do we do it?
  - Stop, discuss, ask questions
- **Why are you here?**
  - What type of project are you wanting to manage?
A project

• ..... a temporary endeavour, having a defined beginning and end (usually constrained by date, but can be by funding or deliverables), undertaken to meet unique goals and objectives, usually to bring about beneficial change or added value.

“The complete idiots guide to project management.” 1998 Alpha Books
Examples

- Capital works projects – new buildings; refurbishments
- ICT projects – implementing new software, hardware
- Designing a new model of care
- Review of an existing situation with a view to making changes
Project Management

• The discipline of planning, organising, and managing resources to bring about the successful completion of specific project goals and objectives.

• Simply a combination of steps and techniques for keeping budget and schedule in line.
Ordinary work v’s a project

Ordinary

– Responding to a consumer’s request for information or to a complaint

– Running the organisations incident management system

– Producing your regular report to the Quality Council

Project

– Producing a monthly consumer newsletter or developing a complaints system

– Identifying and implementing a new incident management system

– Producing the Quality Council’s annual report
Features of a project

1. **Defined beginning and end** *(desired outcome and timeline is specified)*

2. **Uses specifically allocated resources** *(as opposed to general operations)*

3. **End results have specific goals of quality and performance** *(at end something new exists)*

4. **Follows a planned organised approach** *(milestones are specified)*

5. **Involves a team** *(usually)*
Program

• Either
  – A recurring project
    • Producing monthly newsletter
    • Producing the annual report each year
      – Happens predictably
      – Each cycle requires a new plan; a unique end product
  – A group of projects
10. It creates clear picture of the intended outcome strategies to achieve and KPIs
   • greater likelihood of reaching destination

**If not used:** Failure more likely; difficult to determine milestones and prioritise tasks.

9. Risk Assessment
   • Know what rocks the snakes are under.
   • avoid being bitten.

**If not used:** failure more likely; potential to alienate stakeholders and consumers, exceed budget and timelines

8. Milestones
   • More likely to achieve milestones if scheduled and planned out.

**If not used:** failure more likely; missed milestones or forgotten steps = lost time = lost money- even in public sector,
Ten reasons why good PM is important

7. Resource Allocation
   • know which resources have already been allocated
   • able to plan accordingly.
**If not approved and allocated:** more likely to fail, project comes to a standstill or cannot start.

6. Task Dependencies
   • will know what tasks have dependencies
   • able to schedule accordingly.
**If not described:** not being aware of task dependencies leads to a surprise traffic jam

5. Communication
   • Planning facilitates communication with team and stakeholders
**If not planned or no communication** – doomed to fail; all stakeholders need to understand the project
Ten reasons why good PM is important

4. Avoid Scope Creep
   • Planning is good justification for not extending beyond project means
   • Do what you plan

If Scope Creep begins – project more likely to fail, budget ( $ and timeline) may need to be exceeded, additional resources required,

3. The Bottom Line
   • Superiors will appreciate that you have planned your project
   • Others will know
     – what the project consists of
     – your budget
     – resources required
     – deliverables and timeframes
Ten reasons why good PM is important

2. Client Appreciation
   • Your client / manager will appreciate it
   • can be kept abreast of what to expect and when
   • will recognize and appreciate your organization
   • getting his money’s worth.

1. Your team will know what’s going on and what is expected of them.
   • clear objectives
   • scheduled milestones
   • detailed task list
   • good communication

NO CONFUSION
Greater chance of success
So......

Enough of why

What about the how?
Many different models

- Basic principles
- Methods
- Some tools
- A task
- Most recognised –
  - Project Management Institute (PMI) Project Management Body of Knowledge (PMBOK)
  - PRojects IN Controlled Environments (PRINCE) "PRINCE2" second version
Figure 1-2. Life cycle of a troubled project.

1. Project Initiation
2. Wild Enthusiasm
3. Disillusionment
4. Chaos
5. Search for the Guilty
6. Punishment of the Innocent
7. Promotion of Nonparticipants
8. Definition of the Requirements
5 basic phases – give or take

INITIATING

PLANNING

EXECUTING

CONTROLLING

CLOSING

Deliverables from each stage
The three questions

1. What are we trying to achieve?
2. What are we going to put in place to achieve it?
3. How will we know we have achieved it and that we are on the right track?

• PM – a method for answering these
The five phases

- Initiating
- Planning
- Executing
- Controlling
- Closing
1. Initiating the project

- Same as for practice improvement
- Answer first question
- Get a few people together – or even just one other
- Define project goals – what is the intended outcome or final deliverable?
- Define general expectations
  - Management
  - Client
  - Other stakeholders
- Establish project governance
- Form your team – the people who are going to be able to deliver
- Agree project scope VERY important
Scope - example

- New Zealand incident management system
  1. Develop a national policy
  2. Develop and provide education about the policy
  3. Develop specs for an IT system

- Exclusions – not in scope
  - Implementing the policy
  - Ensuring the education is taken back and disseminated in the DHBs
  - Finding the right IT solution
  - Implementing the IT in health services
Scope creep

• Very costly
  – Time
  – People
  – Money

• When asked to add something – always think of the agreed scope, budget and timelines
Deliverables from phase 1

- Documented
  - Team membership
  - Scope
  - Objectives
  - Measures of success
The five phases

- Initiating
- Planning
- Executing
- Controlling
- Closing
2. Planning the project

- Very important phase
- Develop
  - Project plan
  - Communications plan
  - Consultation plan
  - Risk and issues management plan
  - Change management plan – ie dealing with change requests
  - Budget
  - Version control method
- Define responsibilities
- Define deliverables
Deliverables

• Clearly defined
  – Results
  – Goods / products
  – Services
  produced by the project

• Could be
  – Reports
  – Widgets
  – Forms
  – What else ??
The project plan

• Do you need MS project?
## Work breakdown structure – one way

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### Workstream 1: National Policy
- Establish Stream workteam
- Research best practices in other jurisdictions
- Research relevant national legislation
- Obtain existing DHB incident management policy(ies)
- Consult with key stakeholders
- Agree scope and key components of the policy
- Determine MoH policy approval process
- Establish and meet with National Policy Group
- Develop draft policy
- Disseminate for comment
- Survey stakeholders on draft policy
- Undertake amendment process
- Disseminate to QIC and Ministry
- Develop final draft policy
- Submit to MoH for approval
- MoH to issue policy

### Workstream 2: Education and training
- Establish Stream workteam
- Consult with key stakeholders
- Agree objectives and scope of training programme
- Undertake analysis of individual DHB requirements
- Develop education programme
- Identify and train faculty
- Develop programme resources
- Identify and develop resources to support ongoing sustainability
- Schedule training in each DHB or by region
- Deliver training
- Evaluate the training
- Provide close out evaluation summary and sustainability report

### Workstream 3: Scoping the Information system
- Establish Stream workteam
- Consult with key stakeholders
- Determine approval process
- Survey larger group of stakeholders
- Identify absolute requirements established by the policy, legislation and external organisations
- Research standards and best practices in incident information systems
- Scope current practices and systems in all DHBs
- Develop draft functional and technical specifications
- Disseminate for comment and feedback
- Survey stakeholders on draft specifications
- Amend specifications
- Gain agreement on final specs
- Research methods for implementing these specs in all DHBs
- Develop plan and recommendations
- Report on findings and recommendations

### Workstream 4: Project management
- Establish project management team
- Project set-up
- Agree final project objectives and outcomes
- Develop detailed project plan and Gantt
- Develop risk management plan
- Develop project budget
- Establish the project governance structure
- Develop reporting framework
- Determine role of Steering Committee
- Determine role of National Policy Group
- Develop role descriptions and identify DHB co-ordinators
- Establish DHB reference groups
- Manage all aspects of the project throughout
- Provide reports as required

### Workstream 5: Communications
- Develop communications plan
- Identify key stakeholder groups
- Liaise with the Communications Strategist involved with the MoH quality priorities projects
- Develop key messages and media
- Attend national stakeholder meetings, as necessary, e.g. DONs, CMOs, CEOs, Q&R Managers, Board Chairs
- Facilitate regular Steering Committee meetings (via Teleconference)
- Establish project web site
- Branding and brochure development
- Organise and deliver a public, high-profile national launch of the programme
- Deliver communications plan throughout the project
Workstream 1 - National policy

- Time line defined
- Establish stream work team
- Research best practices in other jurisdictions
- Research relevant national legislation
- Obtain existing DHB incident management policy (ies)
- Consult with key stakeholders
- Agree scope and key components of the policy
- Determine MoH policy approval process
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Workstream 2 - Education and training

- Time line defined
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- Agree objectives and scope of training programme
- Undertake analysis of individual DHB requirements
- Develop education programme
- Identify and train faculty
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The project plan

- Do you need MS project?
- It helps, but not essential
- Don’t think you will just go with the flow, see what happens – doh!
- Brainstorm with team (whiteboard, butchers paper, sticky notes)
- Every anticipated step and task – will be many more
- Must define milestones (by date or deliverable)
- Identify interdependencies
- Review and revise often – sometimes daily
- Must be hierarchical
Project (or WBS) levels

1. The total project
2. Sub projects or milestones
3. Major tasks
4. Subtasks
5. Minor tasks or work elements
Risk and issues management

- Brainstorm possible risks and issues
- Record
  - Risk number
  - Date identified
  - By whom
  - Who is going to own / manage it
  - Mitigation / management strategy
  - Risk rating before and after mitigation strategies
  - Response to actions taken
  - Date closed
Budget development

• **Top down**
  – Senior managers estimates budget from experience
  – Then allocates the bucket

• **Bottom up**
  – The team gets together and nuts out what is required from task level
  – Better way to get it right

• Depends how your org usually does this
• Difficulty when costing an external project
• Must do a strict allocation when (if) funds identified
Deliverables from Phase 2

• The final (for now) project plan
  – written
  – “graphed” or mapped

• Comms plan

• Consultation plan

• Risk and issues management plan

• Change management process
1. Exec summary
2. Project objectives
3. Assumptions and risks
4. Milestones
5. Work Breakdown Structure
6. Project map
7. Resource details
   - Human resources
   - Equipment
   - Materials and supplies
8. Budget details
9. Project organisation
10. Operating procedures
11. Project evaluation method
12. Approvals
13. Stakeholders, contacts and information sources.
Small group task – 20 mins

- Break into small groups
- Choose one of the following projects
  1. The design and delivery of an education program on a new infection control policy in your organisation
  2. The organisation of the St Elsewhere’s Hospital Quality Awards and the presentation night
- Develop either a WBS or a Gantt chart (by hand!) for either of these projects
- Start big. What are the key components of this project?
- Then what are the main tasks in each of those components
- Then, if time what are the timelines you will need to achieve. Start date, end date and any known dates in between
The five phases:

1. Initiating
2. Planning
3. Executing
4. Controlling
5. Closing
3. Executing (the project!)

- Getting the work done
- According to the plan
- Should be longest phase
- Firefighting
- If able (and big enough) have a launch, kick-off
- First meeting – sets the tone
3. Phases of team development

• Forming
• Norming
• Storming
• Performing
• Mourning
Features of a good team

- Safe (*no ad hominem attacks*)
- Inclusive (*open to all potential contributors; values diverse views; not a clique*)
- Open (*considers all ideas fairly*)
- Consensus seeking
- Communicative

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Consensus is

• Finding a solution acceptable enough that all members can support it; no member opposes it.

It is not ....

• a unanimous vote -- consensus may not represent everyone’s first priorities.

• a majority vote -- in a majority vote, only the majority gets something they are happy with; people in the minority may get something they don’t want at all, which is not consensus.

• everyone totally satisfied

Suggested Ground rules

• All team members and opinions are equal
• Team members will speak freely and in turn
  • We will listen attentively to others
  • Each must be heard
  • No one may dominate
• All agreements are kept unless renegotiated
• Once we agree, we will speak with “one voice”-- especially after leaving the meeting
• No complaints without suggested solutions
• Consensus vs democracy: each gets their way not their say
• Members will attend regularly
• Meetings will start and finish on time
• AGREED ACTIONS MUST BE ACTIONED

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Meeting process – steering and project

- Attendance required
- Minutes
- Action log
- Status report
  - Overall status
  - Completed tasks
  - Budget
  - Completed milestones (date planned, date achieved)
  - Next priorities
- Risks and issues
- Specific issues
Some tips

• Stay well organised
• Review the plan regularly
• Meet your team often – formal and informal
• Document now, hard to remember later
• Record lessons as they become apparent
• Do things with the team to remain motivated
• Keep people in the loop and up to date
• Make all communications count
Deliverables from Execution phase

• All that has been promised of the project
  – A policy
  – A form
  – An evaluation
  – A new widget
  – A new IT system across the whole organisation
  – A new organisational structure
  – A successful function - Organisation’s Quality Awards ceremony eg
  – The final report
"I'M SORRY, BUT IT SAYS HERE THAT YOU DIDN'T MEET YOUR PROJECT DELIVERABLES."
The five phases

- INITIATING
- PLANNING
- EXECUTING
- CONTROLLING
- CLOSING
4. Controlling phase

• Only achieved by
  – Detailed planning
  – Good communications
  – Clear admin processes

• Will always need to deal with
  – Change
  – Problems
  – Risks
  – Unexpected circumstances

• “Focus on the plan, keep your eyes on the prize”

The Complete Idiot’s Guide to Project Management
Success criteria for project control

- Use the project plan as primary guide for coordination
- Constantly monitor and update plan
- Remember that quality communication is key to control
- Get involved
- Adapt if necessary, but consider scope always
- Document progress and changes
- Communicate these to team
What to monitor

• Status of work
• Volume of work being completed
• Quality of work being undertaken
• Costs and expenditures
• Attitudes of people involved
  – Team
  – Clients/customers
  – Management

• Cohesiveness and co-operation of team members
  (don’t want to loose one during the project!)

All – regardless of size and complexity
Managing project change

• 5 major components that can change
  1. Goals
  2. The people
  3. The money/budget
  4. Material and technical resources available
  5. Time available for completion

• May need to replan, re-approve and replan again

• Establish agreed change process and procedure at project initiation - document
Deliverables from control processes

- Status reports
- Risks and Issues register and updates
- Meeting minutes
- Change requests and approvals
The five phases

- Initiating
- Planning
- Executing
- Controlling
- Closing
5. Closing the project

• “Will the last one out please turn off the lights”

• Evaluate outcomes and write the close out report
  – Project method
  – Description
  – Project Deliverables
  – Project success factors
  – Lessons learnt
  – Recommendations

• A chance to brag, or reflect!!
"Your report is totally without merit. Add a color cover and some clip art then resubmit it."
A Close Out Report

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Project tools and templates needed

- Project plan
- Project scope
- Action Log
- Change Register
- Change request template
- Customer Satisfaction Survey
- Internal Post-Project Review
- Issue/Risk Notification
- Risk Register
- Issues Register
- Lessons Learned Register
- Project Case Study
- Project Close Out Report
- Project Status Report
- Project Team Meeting Agenda
- Project Team Meeting Minutes
- Steering Group Meeting Agenda
- Steering Group Meeting Minutes
- Team Member Profiles
Motivation + Vision + Skills + Action Plan → Effective improvement

- Clear shared vision + Capacity for change + Actionable first steps → Very slow start

- Motive for change + Capacity for change + Actionable first steps → False starts Fades out

- Motive for change + Clear shared vision + Actionable first steps → Anxiety frustration

- Motive for change + Clear shared vision + Capacity for change → Uncoordinated efforts

Adapted from The Paideia Consulting Group 1996
Thank you

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