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SPEAKER :: TRAINER :: COACH

# Project Management Fundamentals

Developed and Prepared for:



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## ***Jan Dwyer Bang, MBA, CSP***

For refreshing new insights, radiating energy, contagious humor, and easy to implement strategies, Jan Dwyer Bang provides a unique and memorable experience that will leave a lasting impression for your next meeting, retreat, or teambuilding session. Jan helps organizations, associations, and individuals by providing customized strategies with an uncanny ability to engage an audience.

With a University of Chicago MBA, and with hands-on experience in small business, non-profits, state & federal government and Fortune 500 companies, Jan brings expertise that is grounded in real-world situations. She is a frequent speaker at associations, conferences and church functions.



Her topics include:

- Supervision and Management Skills
- Communication Skills
- Speaking and Facilitation Skills
- Teambuilding Skills
- Presentation Skills

Her training and teambuilding sessions incorporate a wide variety of popular assessment instruments, including The Birkman and DiSC profiles. She is a Certified Everything DiSC Workplace® Facilitator and a Five Behaviors of a Cohesive Team™ Accredited Facilitator through Wiley. Jan is also a certified facilitator of the Franklin-Covey programs, *7 Habits of Highly Effective People* and *Leading at the Speed of Trust*. Additionally, Jan is pursuing her Associated Certified Coach credential with the International Coaching Federation. She is a published author in several publications and is a featured author in two books, including *Real World Career Development Strategies That Work*.

She has been an active member of the National Speakers Association for over twenty years and previously served as president of the Northwest Chapter of the National Speakers Association. Jan is one of less than 500 women worldwide who has the Certified Speaking Professional designation (CSP) awarded by the National Speakers Association for platform excellence and client satisfaction.

Clients:

- The Boeing Company
- Medtronic Physio-Control
- Weyerhaeuser Company
- Seattle's Union Gospel Mission
- The Starbucks Company
- State of Washington

### **Jan Dwyer Bang, MBA, CSP**

Boundless Results

*Making great leaps at work and in life*

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After attending this session, you will be able to:

- Understand the fundamentals of project management
- Identify stakeholders
- Establish clear and measurable outcomes
- Clarify roles and responsibilities
- Identify project risks
- Discover the elements of a good scope of work
- Create a project schedule
- Create a communications plan
- Recognize the steps to take when a project is not working
- Document lessons learned

What is the first word that comes to mind when you hear the term "project management"?

What are the consequences of poorly managed projects for your team, your section, your stakeholders, and at the Department of Ecology?

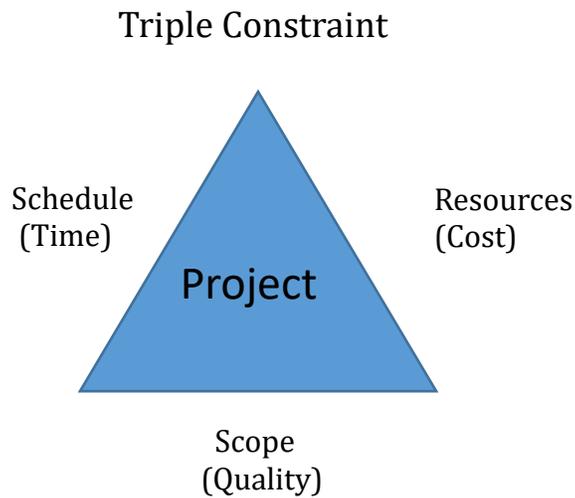
## **Definitions:**

*Project* – A temporary endeavor undertaken to create a unique product, service or result.  
*A Guide to the Project Management Body of Knowledge (PMBOK)*, Project Management Institute; 5th edition, 2013.

*A project* always has three components:

1. Specific scope (Quality)
2. Schedule (Time)
3. Resources (Cost)

## Definitions: (Continued)



*Project management* is the discipline of initiating, planning, executing, controlling. And closing the work of a team to achieve specific goals and meet specific success criteria.

- Nhi Irwin, Supervisor, Preparedness, ECY

*Project management* is as much about effectively leading people as it is about skillfully managing a process. People + Process is the key paradigm shift for twenty-first century project management.

-*Project Management for the Unofficial Project Manager*

*Project management* is the process of guiding a project from its beginning through its performance to its closure. Project management includes five sets of processes:

1. Initiating processes
2. Planning processes
3. Executing processes
4. Monitoring and controlling processes
5. Closing processes

## **The Tasks that Ecology Project Managers Perform include the following:**

- ✓ Reviewing and developing grant and loan applications, writing RFP's, tracking timelines for completion, billing, and taking care of financial tasks/tracking
- ✓ Drive the project to keep it on target, troubleshoot blockages, make technical/regulatory decisions, maintain project records, provide management briefings
- ✓ Developing scope of work and schedules, reviewing project submittals, and approving invoices, managing unexpected events, reporting on project status
- ✓ Evaluate new project applications, provide technical assistance, communicate between recipient team and ecology team, review deliverables
- ✓ Developing technical document review, planning for public comment periods, leading communication with internal team and external stakeholders
- ✓ Coordinate and facilitate stakeholder groups, author plans, give status updates, and oversee projects from initiation to closeout
- ✓ Negotiate agreements, communicate with grant recipient, review progress reports, review deliverables and close out grants

*Project managers have been defined as people responsible for doing something that has never been done before, for people who don't know what they want, who must first predict the unknown, plan to cope with the unforeseen and execute the plan with too-limited resources that they do not control and who are held completely responsible for results, even if miracles are required.*

*- Practical Project Management, Michael Dobson*

The participant guide will follow this order:

1. Initiating (Pages 6-11)
2. Planning (Pages 12-15)
3. Executing (Pages 16-18 )
4. Monitoring and Controlling (Pages 18-20 )
5. Closing (Pages 20-22)
6. The People Part of Project Management (Pages 23-26 )

# 1. Initiating

*Nothing is less productive than to make more efficient what should not be done at all.*  
-Peter Drucker

Initiation of a project is all about defining its objectives, scope, purpose and deliverables.

In most projects that you are involved with at the Department of Ecology, the initiation phase has already been established by senior leadership. The project was researched, and the decision was made by your boss or others within the agency that this project is feasible and it should be undertaken.

However, in those cases where you do have the authority to issue a project's "green light", below are some questions that will help you to decide whether to move ahead with a project:

1. ***Should we do this?*** Are the benefits we anticipate achieving worth the costs? Or are there better options?
2. ***Can we do this?*** Is the project "technically feasible?" Do we have the required resources available?

Initiating is the most important of the five stages since confusion or misunderstanding in the beginning can have a major impact on the project down the road.

Indeed, many project managers cite that the root cause of project failure is a lack of shared expectations. According to experts, the primary reason for dismal project performance is "unrealistic expectations based on insufficient data and information."

It is critical as a project manager to make sure everyone who has an influence on the project has the same "end in mind." It is possible to meet all project specifications and not meet client/stakeholder expectations.

It is during this phase that project managers need to do thoughtful planning. Here are some questions to answer every time you begin a project:

1. Who are the stakeholders?
2. Who is impacted by the project?
3. What does success look like? And who determines success?
4. What resources are available for the project?
5. What are the project limitations or constraints?
6. What internal or external factors will influence the project?
7. How do we create a shared understanding of the project's outcome?

Getting responses from your stakeholders is useful to answering these questions.

**A stakeholder:** A person or an organization that is actively involved in the project or is positively or negatively impacted by it.

**A key stakeholder:** Any person who determines the success or failure of the project.

The ultimate outcome of the initiation phase is that document called “Project Scope Statement.” In some organizations this is called a project charter or a project initiation document (PID). This document outlines the **project purpose** and **requirements** and, in many cases, includes **business needs, stakeholders, and business case**. This document provides a **baseline understanding of the scope of a project and deliverables**.

*The Project Management Body of Knowledge (PMBOK)* by the Project Management Institute defines a scope statement as “a documented basis for making future project decisions and for confirming or developing a common understanding of project scope among the stakeholders. As the project progresses, the scope statement may need to be revised/refined to reflect the approved changes to the scope of the project.”

A Project Scope Statement can include the following:

Purpose and Justification of the project	Project Deliverables
Scope Description	Acceptance Criteria
High Level Project Requirements	Project Constraints
Project Boundaries	Project Assumptions
Project Strategy	Cost Estimates/Cost Benefit Analysis

On page 9 is a guide to use to get clarity around the end goal and help you develop your Project Scope Statement. To obtain a free detailed Project Management Scope statement template – use the search function at: [www.projectmanagementdocs.com](http://www.projectmanagementdocs.com)

## How to Write a Clear Project Scope Statement

Like a project scope of work this document must be clear, logical, and concise enough to be understood by all parties, as well as descriptive enough to detail the project.

- ✓ Clearly written with elements of “Plain Talk”:
  - Understand customer needs
  - Include only relevant information
  - Use words your customers/stakeholders use
  - Use the “active” voice
  - Keep sentences and paragraphs short
- ✓ Results-focused
- ✓ Clearly defined
- ✓ Complete and Measurable

## PROJECT SCOPE STATEMENT

**Project Name:**

**Project Start:**

**Project End:**

**Project Purpose:** (Key reasons for the project/What is wrong with the existing situation?)

- What prompted the need for this project?

**Who is the Sponsor? (Where is the Source of Funding Coming from?)**

**Who is the Project Manager?**

**What authority is being given?** (In terms of making decisions, what elements need a sign-off, what elements need a review)

**What level of management review do you need?**

**Description:** (The how, what, & when of key tasks/How will things be better when we are done?)

- What are the deliverables?
- When and to whom is this project to be delivered?

**Desired Results:** (A prioritized list of specific and measurable tasks and activities)

- How would you know if the project (measurable outcomes) were successful?

**Exclusions:** (Items out of the scope)

- What items are not part of this project?

**Communication Needs:** (Who, how, and how often)

- What does good communication throughout the project look like? (Team norms)
- How would you like to be communicated with during the project?
- Who should be communicated with and what type of communication would they receive?

**Acceptance Criteria:** (Who needs to sign off on what, and how will they sign off?)

- How will we know it's acceptable to move forward after each milestone?
- Who needs to approve steps and what needs approval along the way?

**Constraints:** (A prioritized list of restrictions or limitations)

Examples: Scope, quality, resources, budget, risk, time.

- Scope – What products, services or results are necessary to ensure project success?
- Quality – How is quality defined (metrics) on this project?
- Resources – What resources are available for this project?
- Budget – What things did you consider when determining the budget?
- Risk – What things can you think of that would cause project failure?
- Time – Who or what else will be impacted by these timing decisions?
- General – How do you prioritize the constraints?

**Who do you need input from and how will you get the input?**

**What state laws, regulations, policies, funding source conditions, and other agreements could be applicable?**

**What lessons learned can apply from audits and other programs that could be incorporated as considerations to this project?**

*Adapted from Project Management for the Unofficial Project Manager and Making It Happen and Project Work Plan Template (Nhi Irwin, Department of Ecology)*

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## **Another important consideration in the Initiation Phase:**

***Know the Terms of the Agreement*** – All requirements of the grant or loan, or contract whether in statute, regulations, administrative requirements, program guidelines or the agreement document.

- a. **General Terms and Conditions** are the terms and conditions that apply to all Ecology grants and loans and contracts

*Example: General Terms: Covers items such as Administrative Requirements, Compensation, and Compliance with All Laws*

- b. **Special Terms and Conditions** (For Grants and Loans) are in addition to the General terms and are applicable to a specific funding program

*Example: Federal Funding Accountability and Transparency Act (FFATA) Reporting Requirements*

*Contractor must complete the FFATA Data Collection Form (ECY 070-395) and return it with the signed agreement to Ecology*

*Any CONTRACTOR that meets each of the below criteria must report compensation for its five top executives using the FFATA Data Collection Form.*

- *Receives more than \$25,000 in federal funds under this award.*
- *Receives more than 80% of its annual gross revenues from federal funds.*
- *Receives more than \$25,000,000 in annual federal funds.*

*ECOLOGY will not pay any invoices until it has received a completed and signed FFATA Data Collection Form. ECOLOGY is required to report the FFATA information for federally funded agreements, including the required DUNS number, at [www.fsrs.gov](http://www.fsrs.gov) within 30 days of agreement signature. The FFATA information will be available to the public at [www.usaspending.gov](http://www.usaspending.gov).*

*For more details on FFATA requirements, see [www.fsrs.gov](http://www.fsrs.gov)*

- c. **Agreement Specific Terms and Conditions** (For Grants and Loans) in addition to General and Special terms are applicable to a specific agreement.

*Example: “In the event the monitoring equipment is no longer needed by the RECIPIENT and is still in good useable condition, it will be returned to Ecology.”*

## **As you write project goals, remember the SMART approach:**

**S** = Specific

**M** = Measurable

**A** = Agreed-upon

**R** = Realistic

**T** = Time-Framed

### **TOP TEN PITFALLS DURING INITIATION**

1. Adding an extra project to your team's current workload without allocating additional time or resources.
2. Beginning a project with undefined time and cost estimates.
3. Failing to establish evaluation metrics of success early.
4. Not getting signoff from the customer/key stakeholders on early plans.
5. Doing it your way, ignoring organization's protocols, templates, and other artifacts.
6. Losing time by starting without pertinent lessons learned and historical data.
7. Jumping into a project without clarifying your customer's specifications.
8. Not clarifying the team reporting structure and stakeholders' roles early.
9. Not confirming all costs and which ones will be covered by the customer vs. the organization.
10. Beginning a project without a formal project charter or similar document.

Adapted from *The Project Management Answer Book* by Jeff Furman, PMP

#### Group Discussion Question:

- What pitfalls do you identify with?
- What best practices could you employ in your next project to avoid some pitfalls?

## **Best Practices – Initiating**

- Clarify the project to make sure you know what you are being asked to do, including budget, schedule, scope, and communications.
- Get clear on how to define project purpose, objectives, and success and how this project can be accomplished within budget and timeline.
- Define the key stakeholders early and identify and document responsible stakeholder and their commitments.
- Consider identifying team norms, as well as communication and file naming protocols.
- Incorporate closing project activities into your project scope statement.

## **Initiating (Examples of Best Practices from Dept of Ecology Staff)**

- Look at previous scopes of work for similar work, either for that applicant or other applicants doing similar work; have a good template of the initial project plan.
- Pre-application meetings to discuss project ideas, details, eligibility questions.
- Consider all stakeholders. Everyone must be heard. Roles and responsibilities must be crystal clear.
- Pre-Project meetings can generate a clear understanding of the requirements/goals for the entire team.
- Work with upper management to determine desired outcomes.
- Budget – do you have one? How long is money good for? Consider requiring the recipient to draft the scope first and build the budget around that.
- Stakeholders - who are you working with? External, internal, political?
- Ensure solid technical understanding up front; work with fiscal staff and get templates from them (And know EAGL!).
- Establish proactive engagement with partners; good communication and relationship building with the grantee.
- Plan field visits, face to face meetings with grantee, and early agreement negotiation.

## 2. Planning

Once you have identified what direction to go with your scope statement, the project plan tells you how to get to your outcome. Planning involves several elements:

- ✓ **Planning and assessing for project risk**
- ✓ **Creating a project schedule and budget** (Tools such as Work Breakdown Structure, mind maps, post-it-notes, Gantt charts, dependency charts)
- ✓ **Developing a communications plan**

### Planning and Assessing for Project Risk:

Assessing and managing risk means identifying project risks and assessing their impact.

**Formula for Risk: Impact X Probability = Actual Risk**

#### Impact:

- 5 = worse case
- 4 = relatively important impact
- 2 = minimal impact

#### Probability:

- 5 = high likelihood it will happen
- 3 = 50-50 chance it will happen
- 1 = slight possibility it could happen

*Risks that score 12 or higher – you need to create a strategy to reduce risk*

### Group discussion:

Share all the things that can go wrong with a project. Once you have brainstormed all the possible risks, evaluate them for both impact and probability.

Description of Risk	Impact	Probability	Score

Share with your group what you do with high-scoring risks:

## Creating a Project Schedule and Budget:

Now is the time to figure out what to do when and to break your project into manageable chunks. The schedule contains all key tasks, major deliverables, and milestones to complete the project. The steps for creating a project schedule include the following:

1. Develop the WBS
2. Sequence activities
3. Identify the project team
4. Estimate duration of each task
5. Identify the critical path
6. Create a project budget

*Work Breakdown Structure (WBS)* – A WBS is a deliverable-oriented grouping of project components (tasks) that organizes and defines the total scope of the project (PMBOK). The deliverables are the “what” of the project and the components make up the deliverables. The top level is called project and the lowest level of detail is typically called a work package. (Other levels are phases, work assignments, tasks, subtasks, etc.).

- ✓ Post-it Note Methods – Use Sticky notes to engage your project team. List each component across the top of a whiteboard. Then have your team write on post-it notes each activity they can think of that is required to complete each component. Watch this YouTube Video: <https://www.youtube.com/watch?v=80c-LRRJ0W8> (Project Planning with Sticky Notes).
- ✓ Mind Maps – A process to capture your thoughts and bring them to life in visual form without worrying about putting them in order.
- ✓ Gantt Chart – This is a bar chart that shows when each task begins and ends and how tasks depend on each other.

Status	% Done	Deliverables/Components/Activities
--------	--------	------------------------------------

*Sequencing Activities* - Sequencing means what needs to be done when and which activities must be done before, at the same time, or only after another task (Dependency)

- ✓ A Dependency Chart (*Also known as Network Diagram*) shows a logical relationship where two activities are reliant on each other’s start or finish.

*Estimate how long each task will take* - Remember the difference between work and duration. **Work is the time needed to accomplish a task. Duration is the period of time needed to get the work done from start to finish.** Work drives project budget, while duration drives our project schedule.

- ✓ PERT (Program Evaluation and Review Technique) – Use the PERT Formula to help you figure out how long each task will take. Optimistic time/most likely time/pessimistic time.
- ✓ Milestones – A milestone is a significant point or event in a project. Milestone meetings are a great way to keep track of your project schedule and deliverables.
- ✓ Critical Path – The sequence of activities that represents the longest path through a project, which determines the shortest possible duration. (PMBOK). If you need to finish your project in less time, consider ways to shorten its critical path. The activities on the critical path have no flexibility in when they begin and end. If you miss any item on the critical path, you are at high risk for failure. By understanding the critical path, you can see in advance where bottlenecks might occur and plan to avoid or bypass them before they happen.

*Creating a Project Budget* - Even if you are not responsible for the budget, it is critical that you think about the costs of the project, in terms of both external and internal expenses. Note: for most Ecology projects – the budget should be with the Scope of Work or the Initiation Phase.

### **Developing a Communications Plan:**

Communication planning involves determining the information and communications needs of the stakeholders: who needs what, when they will need it, how it will be given to them, and by whom. (PMBOK).

Since so much of your success of a project involves communication, you’ll need to develop a plan to make sure you don’t miss anyone. Here’s a simple format with an example:

<b>What-Communication type</b>	<b>Who-Initiator/audience</b>	<b>How-Method</b>	<b>When-Time/frequency</b>
Status Updates	Terry/PM Team	Conference call	Twice monthly

## **Best Practices – Planning**

- Stay engaged – don't assume that no news is good news.
- Consider using a centrally stored tool so the entire project team has access.
- Stick to a few key planning documents.
- Use a planning tool such as a Gantt chart that helps you remember all the steps involved in a long project and how much time is needed for external reviews.
- Plans, including estimates and scope, are refined throughout the project. But remember that each element of the planning relates to another so a change in one element may affect another element.

## **Planning (Examples of Best Practices from Dept of Ecology Staff)**

- Plan for onboarding people to a project, including bringing new people into an established project.
- Conduct progress reports and regular & quarterly check-ins to make sure the project is on schedule and on budget; include site visits.
- Consider webinars as a good planning tool.
- Create ahead-of- time reminders before deliverables are due.
- Create weekly calendaring with swim lanes for stakeholders.
- Train grantees on good reporting.
- Incorporate a tracking system so that data can be tracked and compared with baselines - at three-month and six-month intervals.

Group discussion:

What other planning tools have been helpful?

## 3. Executing

*Stakeholder satisfaction may be the single most significant ingredient in project success.*  
-Andy Crowe

Execution is doing or performing the project. Activities include directing, managing, performing, and accomplishing the project work; providing the deliverables; and tracking work performance information. (PMBOK).

A few considerations in this phase:

### 1. *Engaging people*

- ✓ Keep a compelling scoreboard – to help achieve the highest performance.
- ✓ Communicate in “their style”.

### 2. *Keeping people accountable*

- ✓ Team Accountability – Set expectations for your project team and stakeholders.
- ✓ Holding others accountable – Make sure that everyone knows the roles and responsibilities of the agreement.

Best Practices - working with stakeholders we don't have authority over:

- If in doubt, ask! The biggest mistake Project Managers make with stakeholders is giving them *what they think they want* (but not what they really want).
- Don't just manage your stakeholders – manage their *expectations*
- Use Project Documents that pertain to managing stakeholders:
  - Stakeholder register- Provides the information needed to plan appropriate ways to engage project stakeholders.
  - Issue logs-Used to document and monitor elements under discussion or in dispute between project stakeholders.
  - Stakeholder notifications-Information provided to stakeholders about resolved issues, approved changes, and general project status.
  - Project reports- Reports that describe project status and lessons learned, issue logs, and project closure reports.

From Project Management Institute (PMI). *A Guide to the Project Management Body of Knowledge (PMBOK), Fifth Edition*, Project Management Institute; 5th edition, 2013 and *The Project Management Answer Book* by Jeff Furman, PMP

What you do when working with stakeholders you don't have authority over  
(from Department of Ecology staff)

Maintain trust by regular face-to-face communication; look for mutual benefits	Frequent check-ins with federal grant managers and local partners
Petition management if they have additional negotiation tools/leverage; review regulations, if necessary	Try to convince them that they are not adversaries; Choose your partners well
Good listening, clear and kind communication	Provide parameters of work
Work with stakeholders as best as possible when problems arise; Be proactive, discuss issues before they become larger problems	Have a structured, chartered stakeholder group that convenes at least quarterly (up to weekly, depending on the project)

### 3. *Focusing on the Major Tasks (Deliverables)*

A major task usually has a due date and is tangible, measurable, and specific. Major tasks satisfy a milestone. A milestone is a hard and fast due date that represents a major accomplishment during the project.

- ✓ Major Task - Identify the major task and have a sufficient description to understand what the expected outcome.
- ✓ Planned Completion Date – This is the date indicated in the project plan.
- ✓ Actual Completion Date – This is the date that the deliverable was completed.

### **Best Practices – Executing**

- Allocate a little bit of time to each of your projects, as needed, every day.
- Support and manage your project team, stakeholders, recipients, as they complete the work according to plan.
- Collect information on project updates, hold project meetings, resolve issues and conflicts.

## Executing (Examples of Best Practices from Dept of Ecology Staff)

- Visit the project site, don't count on paperwork.
- Maintain constant contact with your clients.
- Always keep the end in mind. Be the driver of the project, not a follower or observer.
- Create worksheets/checklists; keep a running to-do list for your supervisor.
- Be proactive - keep stakeholders and team members informed about project status.

### Group discussion:

Share other ways you have successfully performed your project. What are some other ways you have been able to keep the project moving forward – even with unexpected challenges?

## 4. Monitoring and Controlling

*How does a project get to be a year late? One day at a time.*

*- Frederick Brooks*

Monitoring and controlling is the process of keeping track of the identified risks to determine if risk responses are as effective as expected, or if new responses should be developed. Risk control may involve choosing alternative strategies, taking corrective action, or re-planning the project. (PMBOK). Essentially, monitoring a project includes monitoring time, budget, and performance.

### Group Discussion:

What are ways you make the project go as planned? (on time, on budget, with quality).

What ways have you found helpful to manage other team members, if applicable?

The Guide to the Project Management Body of Knowledge (PMBOK Guide), Fifth Edition shares these tools to effectively manage a project team or others you work with:

Inputs	Outputs
Team performance assessments Issue logs ** Work performance reports Observation Frequent communication Project performance appraisal Dealing with conflict Appropriate interpersonal skills	Change requests Project management plan updates Project documents updates Organizational standard processes Templates Lessons learned documentation Project staff assignments Role descriptions

\*\* These are documentation elements that contain a list of ongoing and closed issues of a project

The most common Monitoring and Controlling tool that Project Managers use is called the **Project Status Report**. The status report describes where the project now stands related to schedule and budget metrics; what the project team has accomplished; and future project status and progress. (PMBOK).

*Status Reports:*

- ✓ Use different colors to indicate various risk levels.
- ✓ Include summary of team's accomplishments, anticipated problems, and plans.

*Tips for Communicating Status:*

- ✓ Communicate timely status reports.
- ✓ Be accurate in reporting information; be honest about real status.
- ✓ Be prepared to explain known and potential variances and trends.
- ✓ Anticipate stakeholder concerns; know your audience.
- ✓ Keep status reports concise and to the point.

*Avoiding Scope Creep*

Scope creep refers to added tasks that were not included in the approved project management plan. Project change control is concerned with (a) influencing the factors that create scope changes to ensure that changes are agreed upon, (b) determining that a scope change has occurred, and (c) managing the actual changes when and if they occur (PMBOK).

*Ways to Avoid Scope Creep:*

- Avid saying yes to every customer request.
- Incorporate a pre-defined change process for submitting changes.
- Keep the triple constraint in mind when making project decisions.

## **Best Practices – Monitoring and Controlling**

- Schedule milestone meetings as an ideal way to keep your projects on track.
- Use work performance data such as work completed, key performance indicators, technical performance measures, start and finish dates of schedule activities, number of change requests, and actual costs.
- Build in time for changes or amendments to agreements, known as float. Float or slack is the amount of time that a task in a project network can be delayed without affecting the deadlines of other subsequent tasks.

## **Monitoring and Controlling (Examples of Best Practices from Dept of Ecology Staff)**

- Be clear on non-performance (Escalation process, documentation, when to invoke termination clauses of Terms and Conditions).

- Know your file maintenance

Note: 1) For Grant and Loan agreements in EAGL, some of this documentation resides within the system.

2) Reference Policies 13-10 and 13-20

## **5. Closing**

The closing process is gathering, and disseminating information to formalize project completion, including evaluating the project and compiling lessons learned for use in future projects. (PMBOK). Closing essentially means wrapping up your project, evaluating the project, and celebrating success.

Consider planning for your project's completion while you prepare your initial project plan.

Here are the closing activities for the Department of Ecology:

- All deliverables have been received
- Final payment has been submitted
- Final Progress Report
- Recipient has initiated Close-out Report (EAGL)
- Inventory of property/Equipment (if applicable)
- Equipment Purchase Report (EAGL)
- File is complete
- Acknowledge team members and success
- Lesson Learned

Note: There may be additional requirements if agreement is funded with federal money, or the program has special requirements

Here is a checklist of closing items:

<b>Completed</b>	<b>Closing Checklist Item</b>
	Complete any unfinished project activities
	Complete all required deliverables
	Confirm fulfillment of project scope
	Confirm fulfillment of all project change requests
	Obtain all necessary sign-offs
	Assess the extent to which project results met expectations
	Submit final status report to key stakeholders
	Seek feedback from key stakeholders
	With team, document lessons learned or after-action report/debrief
	Perform all required administrative tasks
	Archive project documents
	Communicate success
	Celebrate project closure

After-project debrief can include these evaluation questions:

- ✓ What went well?
- ✓ What didn't go well?
- ✓ What are 1-2 things we can do next time?

A full-evaluation meeting for your project could involve the following:

Project results	Schedule performance	Resource expenses	Problems that arose	Changes during the project
Unanticipated occurrences	Stakeholder satisfaction	Management's satisfaction	Effectiveness of the PM processes	Lessons learned

Adapted from *Project Management for the Unofficial Project Manager* and *Project Management for Dummies*

## Best Practices - Closing

- Engage in an “after action review” once a project is complete to disseminate key learnings to others.
- When turning over the tasks/activities, be sure to obtain all the necessary signoffs from your recipients, stakeholders, clients.
- Upload all your lessons learned and final project plans and artifacts to a central repository so they can be used as historical information for future projects.

## Closing (Examples of Best Practices from Dept of Ecology Staff)

- Communication near the end should include lessons learned from setbacks.
- Identify how the outputs of the project will live on, and who the target audience(s) are for those outputs.

## 6. The People Part of Project Management

*The "P" in PM is as much about "People" Management as it is about "Project" Management.*  
-Cornelius Fichtner

*The greatest problem of communication is the illusion that it has taken place.*  
-George Bernard Shaw

More than 50% of a project manager's time is spent in some aspect of communication. (Meeting, emailing, status reporting, phone calling, coordinating, talking to people, completing documentation). Some studies show that verbal and written communication takes up 80% of the job. The role of the human side of project management has become more important as many projects can fail due to poor human relations, poor productivity, and no employee/stakeholder commitment.

In the book, *Project Management for the Unofficial Project Manager*, the authors share four foundational behaviors that will help you as a project manager gain "informal authority" with others.

1. Demonstrate respect
2. Listen first
3. Clarify expectations
4. Practice accountability

Your ability to deal with people effectively, to empower people to want to work with you, is the essence of what informal authority is all about.

Below are shown a couple of additional people communication tips:

- ✓ Engage in the 5 to 1 Ratio - For every single negative interaction, project managers need to make up for it with five positive interactions. Positive interactions include such interactions as sharing interests, asking questions, and showing empathy. (Based on the work by Psychologist John Gottman).
- ✓ Avoid **SPITR** syndrome - Project managers need to be knowledgeable and confident but avoid being the "**S**martest **P**erson **I**n **T**he **R**oom" that tends to shut others down, making them reluctant to participate. (Jeff Furman, *PMP. The Project Management Answer Book*).

*I always believe it's better to have 30 imaginations working on a project, rather than one imagination telling the other 29 what to do.*

-Trevor Nunn

## Building Trust: How to Begin Relationships on the Right Foot

In the 2-day workshop entitled "Leading at the Speed of Trust", based on the book "Speed of Trust" by Stephen M.R. Covey, trust is defined as the "Confidence born of the character and the competence of a person or an organization." As a project manager, it is important to start out on the right foot when beginning a project by going through (in his words) a "Develop Trust" talk. Here are the steps:

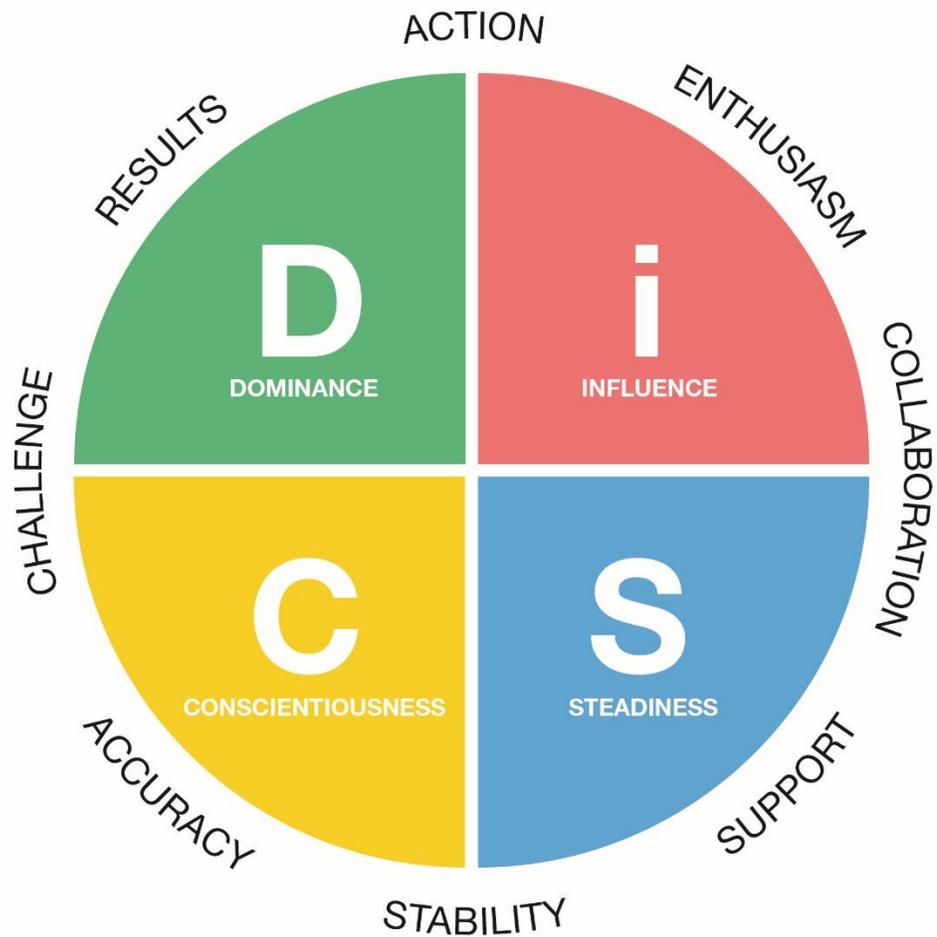
1. **Assess yourself.** Are you operating in ways that inspire trust in others? Are your words and action congruent?
2. **Share your intent with those you are working on the project with.** "It is important for us to have a high level of confidence as we begin working together on this project."
3. **Ask for specific actions that inspire trust in others.** "I would like to know the things we can do to increase confidence between us."
  - o What 1-2 behaviors are important to you to build trust and confidence?
  - o Of those behaviors, which one is most important to you?
  - o What does it look like when people do that behavior?
  - o When people don't do this behavior, what does it look like?
  - o How will you act if one of those behaviors is not met?
4. **Ask if you can share the behaviors that are important to you.** "Is it OK for me to share with you the behaviors that inspire trust that are important to me?"
5. **Commit to doing these behaviors.** "I will commit that I will do those behaviors and would like for you to tell me when I get off track."
6. **Create benchmark meetings to revisit these behaviors.** "Let's agree to meet at a regular basis not only to talk about project status but also to revisit these commitments and possibly discuss new behaviors."

Thirteen high-trust behaviors include the following:

Talk straight	Demonstrate respect	Create transparency
Right wrongs	Show loyalty	Deliver results
Get better	Confront reality	Clarify expectations
Practice accountability	Listen first	Keep commitments
Extend trust		

Adapted from *Speed of Trust* by Stephen M.R. Covey

# DiSC® Styles in the Workplace



## Ways to better adapt your style to the style of others:

Dominance	Influence	Steadiness	Conscientiousness
Talk in terms of results	Engage the person	Cooperate with the person	Be prepared
Be concise and direct	Give recognition	Provide stability (especially in change)	Be quality-minded
Focus on the “what”	Focus on the “who”	Focus on the “how”	Focus on the “why”
Be results-oriented	Ask questions and involve the person in the discussion and projects	Place a priority on cooperation and stability	Place a priority on quality and analysis
Limit social chit-chat, details, and feelings	Place a priority on people and giving the person approval	Emphasize loyalty	Emphasize accuracy

See Appendix to read more about the DiSC communication styles.

## Team Expectations: Team Norms

**Definition:** Team norms are a set of rules or guidelines that a team establishes to shape the interaction of team members with each other and with others who are external to the team. Once developed, team norms are used to guide team member behavior. Team norms are used to assess how well team members are interacting and allows people to call each other out on any behavior that is negatively impacting the success of the team.

**Purpose:** Through a well-defined process, everyone is aware of what is and is not acceptable behavior of all team members.

**Background:** For team success, team members must focus on two components:

- (1) The goals or outcomes expected
- (2) The team process, that includes:
  - How team members interact with and communicate with each other,
  - How the team members communicate with others not on the team, and
  - How team members will be responsible and accountable for moving the project forward and accomplishing the goals.

How does a team make decisions? Assign work? Hold members accountable? The lack of an agreed-upon framework for interaction creates the potential for misunderstanding and negative conflict.

Adapted from <http://humanresources.about.com/od/teambuilding/qt/norms.htm>

### SAMPLE GROUND RULES (Team Norms)

Be a good listener	Keep an open mind	Loyalty to the absent
No cheap shots	Don't be defensive	One idea at a time
Ask for clarification	Give everyone a chance to speak	All meetings will have an Agenda & Action Items
Focus on the present and future, not the past	Deal with specific rather than general problems	Assume positive intentions
Participate in the discussion	Carry out team decisions and follow through with commitments	Be polite - don't interrupt
All comments remain in the room	Everyone is an equal	No cell phones/texting during meetings

# RESOURCES

## Books

Carkenord, PMP, CBAP, Barbara A. and Sonja L. Almlie, PMP, CCBA. *PM Crash Course: A Guide to What Really Matters When Managing Projects*, RMC Publications, 2014.

Furman, PMP, Jeff. *The Project Management Answer Book*, Management Concepts Press, 2015.

Kogan, Kory and Suzette Blakemore and James Wood. *Project Management for the Unofficial Project Manager*, BenBella Books, Inc., 2015.

Kyle, Mackenzie. *Making it Happen: A Non-Technical Guide to Project Management*, John Wiley & Sons Canada, LTD, 1998.

McChesney, Chris, Sean Covey and Jim Huling. *The 4 Disciplines of Execution*, Free Press, 2012,

Sweeney, Benjamin. *Project Management Quick Start Guide: The Simplified Beginner's Guide to Project Management*, ClydeBank Business, 2016.

Portny, Stanley. *Project Management for Dummies*, 4th Edition (April 9, 2013).

Project Management Institute (PMI). *A Guide to the Project Management Body of Knowledge (PMBOK), Fifth Edition*, Project Management Institute; 2013.

## Websites:

What is slack?

<http://whatis.techtarget.com/definition/negative-float-negative-slack>

What is the critical path?

<http://2020projectmanagement.com/2014/05/what-is-the-critical-path/>

20 Things Every Project Manager Should Know – (Corporate Education Group)

<http://www.corpedgroup.com/resources/pm/20ThingsPM.asp>

Do you have what it takes to be a Project Manager? Moira Alexander

<http://www.cio.com/article/2896325/project-manager/do-you-have-what-it-takes-to-be-a-project-manager.html>

10 signs that you aren't cut out to be a project manager (Tom Mochal)

<http://faculty.washington.edu/blabob/bob/Docs/10%20signs%20that%20you%20aren't%20cut%20out%20to%20be%20a%20project%20manager.pdf>

The Smart Art of Project Status Reporting: On Time and To the Point

<https://www.ittoolkit.com/how-to-it/projects/project-status-report.html>

The Best Practices for Project Initiation Stage

<https://www.wrike.com/blog/best-practices-project-management-initiation-phase/>

**Classes** - Various ideas in this guide have been gathered from the following classes and Conferences:

Project Management Essentials, Presented by Tom Prior, SkillPath

Introduction to Modern Project Management Theory and Practice, Alison online course

# APPENDIX

# Team Meetings

Holding frequent and regular team and project milestone meetings is an essential ingredient that can increase your effectiveness as a project manager.

## Tips for Effective Team Meetings

- Create a schedule and stick to it.
- Create an agenda and send it to your team before the meeting so they can prepare and know what to expect.
- Your agenda should have the following items: Topic, time allocation, and person responsible.
- Tie meeting discussions to broader strategic goals.
- Consider rotating leadership of project meetings.
- Consider incorporating an educational portion to your project or team meeting.
- For effective meeting management, facilitate a discussion of team norms
- Consider this meeting requirement: if data will be presented during the meeting, it needs to be shared in advance.
- Engage everyone in the discussion.
- Actively listen so you set the example for everyone.
- Manage challenging behaviors.
- Incorporate discussion in your team meetings so your meetings are not a monologue.
- Add some fun and excitement to your meetings.
- End every meeting with the following:
  - Summary of what was decided
  - Action items, deadlines, and people responsible
  - Next steps
  - Evaluation of the meeting (What went well/what didn't go well/ideas for future meeting)
- Consider the attendee list carefully.
- Start on time – don't wait for latecomers.
- Consider holding a stand-up meeting.

# Time & Stress Management

## Analyzing your Time

- Keep a time log of your activities and the time spent on each. This helps you understand patterns and helps you answer the question, “Who seems to control most of my time?”
- Estimate the time that each of your to-do items will take. “Good time managers calculate how long things take and build the time they need into their schedules.” (Julie Morgenstern, *Time Management from the Inside Out*)
- Analyze your staff meeting time. Are your team meetings as productive as they can be?
- Block out 2 hours every Friday for weekly review. (Weekly regrouping ritual – builds in some capturing, reevaluating, and reprocessing time to keep you in balance).

## 4D Formula

1. **Do it now** - If it will take 2 minutes or less, do it now.
2. **Defer it or Date Activate it** – If it will take you longer than 2 minutes, consciously reschedule it for a better time.
3. **Delegate it** – If there is something on your list that someone else can do better, faster, or well enough, give it to them.
4. **Delete it** – Ask yourself, what quadrant does this task fall into? Or what is the worst thing that can happen if I don’t do this task? If it isn’t important, delete it. Note: If you need it as a reference, move it into a reference folder. The goal is to reduce the number of times you touch each message.

## Interruptions

“40% of the time, the disrupted task was not resumed immediately following the interruption.” (Microsoft research study)

- Think of interruptions as a part of your job.
- Encourage people to set appointments instead of relying on spontaneous drop-in visits.
- Integrate a simple system to get right back to your project after an interruption.
- Establish team norms.
- Stand up when someone comes into your office or when you answer the phone.
- Empower people to make their own decisions.
- Consider scheduling “available” and “unavailable” times and communicate to your team.

## **Priorities**

- Blocking things out in your calendar based on your highest priorities.
- Ask yourself, “Do I really need to be at this meeting?”
- Think of the time you’ve blocked out for your priorities as if they were real appointments with real people. (Julie Morgenstern).

## **Scheduling**

- Make and keep appointments with yourself.
- Schedule one-one-one check-ins with your supervisor or project team members.
- Solicit feedback from others as it relates to scheduling.
- Schedule the “big rocks” or highest priorities first in your schedule.
- Allow commuting and prep time for meetings.
- For team meetings, create an agenda and share to meeting attendees.
- Schedule your day every half hour.

Adapted from 7 Tips for Managing your Schedule like a Pro - <http://www.entrepreneur.com/article/243962>

## **Workload/Too Much to Do**

- Break down overwhelming tasks into manageable parts.
- Combine a task you don’t like with something you enjoy.
- Ask yourself “So what’s the next action?”
- Give yourself a time limit and impose your own deadline.
- Distinguish between tasks you can safely ignore and those things that demand your attention. (Michael Hyatt called this “Workplace Triage”).

Adapted from an article, “When you feel overwhelmed by your workload” by Michael Hyatt - <https://michaelhyatt.com/when-you-feel-overwhelmed-by-your-workload.html>

## MORE ABOUT YOU

If you are a **Dominance** style, your strengths include that you:

- Can decide when no one else wants to
- Are not afraid to confront tough issues/situations
- Accept change as a personal challenge
- Keep the team focused and on task

Those you work with may see the following limitations:

- May come across as unapproachable
- Insensitive to others
- Impatient with others
- Try to get the team moving along before its ready

You can be more effective by:

- Developing more patience
- Toning down your directness – asking more questions
- Working on your approachability – watch body language and offer more encouragement in conversation

If you are an **Influence** style, your strengths include that you:

- Are always available to others – give your time easily
- Are good at inspiring others
- Spread your enthusiasm and positive attitude to others
- Easily give positive feedback to those you work with

Those you work with may see the following limitations:

- Disorganized
- Superficial in your approach
- Lack of follow through

You can be more effective by:

- Listening more carefully to what people really need
- Getting more organized
- Providing more detail

## MORE ABOUT YOU

If you are a **Steadiness** style, your strengths include that you are:

- A good team player
- Empathetic and sensitive to the needs of others
- Methodical and good at preparing meeting agenda and minutes
- Good at listening
- Easy to get along with

Those you work with may see the following limitations:

- May come across as indecisive
- Indirect communicator
- Resistant to change

You can be more effective by:

- Becoming more assertive and direct with others
- Coping better with change
- Not carrying the burden of everyone else's problems

If you are a **Conscientiousness** style, your strengths include that you are:

- Thorough
- Certain to follow standards accurately
- Conscientious
- Accurate

Those you work with may see the following limitations:

- Overly concerned with perfection
- Aloof
- Limit creativity in others with your desire to stick to the rules

You can be more effective by:

- Better accepting differences
- Being more open to possibilities
- Communicating more often