PROJECT MANAGEMENT TRAINING

PART 1 – PLANNING YOUR PROJECT

FEBRUARY 2, 2017
Congrats!
Have you ever had Grant-Induced Anxiety?
Does this sound vaguely familiar?

January: “Yay! We were awarded a new grant😊 We have 12 LONG MONTHS to work on this. I can’t wait to get started on this...NEXT MONTH....”

April: “OK....I have 9 months left on this grant project. I’m a little behind but we’re still OK. We can get caught up NEXT WEEK...I’ve got other things that I need to get done...”

June: “Yikes! There’s 6 months left to get this grant finished...we will be busy but we can still get this done....STARTING TOMORROW....”

September: “Oh $&!#! Only 3 months left...there is no way I can get this done in time! I better call [Jackie, Catherine, Tawny] They are SO nice! I’m sure they will understand that 12 MONTHS WAS JUST NOT ENOUGH TIME!”

(Procrastination)
Or these?

Caller ID shows area code “303”...that’s COLORADO! Better let that go to voicemail!

(Stick Head into Sand)

What do you mean my Progress Report is late! My Assistant was supposed to type that up last month.....

(Blame Your Innocent Secretary)
Pursuit of Stress-Free Grant Management
 Relevant Experience

- Mississippi Choctaws – Director of Economic Development
- 20+ years of Tribal Economic Development Experience
- Project management experience includes development and start-up of many tribally-owned companies representing an >$500 million investment
- Currently managing 8 separate grant projects for the Tribe
- Participated in a wide range of project financing methods including traditional loans, loan guarantees, and New Markets Tax Credit financing.
- Manage the Tribe’s 800,000 square foot commercial real estate portfolio
- General Manager of the Tribe’s certified organic vegetable farming business
- Bachelor’s degree in Business Administration from Millsaps College
- Master’s degree in Business Administration from Duke University
Today’s Agenda

✓ Program Management vs. Project Management
✓ Keys to Successful Project Management
✓ How Much Planning Should You Do?
✓ Review a Common Approach
✓ Identify Tasks / Activities and Expected Duration
✓ Organizing your Project Plan
✓ Developing a Communications Strategy
✓ Homework Assignment
Let’s Start with a Quiz...

Program Management = Project Management
Key Definitions

**Program**: A group of related projects...that are managed in a coordinated way to obtain benefits not available from managing them individually. All projects within a program are related by a common goal, often with strategic importance.

**Program Management**: The application of knowledge, skills, tools, and techniques to a program to meet the program requirements and to obtain benefits and control not available by managing projects individually.

**Program Manager**: The person authorized by the performing organization to lead the team or teams responsible for achieving program objectives

**Source: PMI**
Key Definitions

**Project**: Temporary endeavor undertaken to create a unique product, service, or result with a defined beginning and end achieved either by meeting project objectives/goals or by being terminated due to objectives/goals not being met.

**Project Management**: The application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

**Project Manager**: The person authorized by the performing organization to lead the team or teams responsible for achieving project objectives

**Source**: Project Management Institute (PMI)
Local Foods Example

PROGRAM Mission: To increase the supply of fresh produce that is grown on tribal lands and made available to tribal members and food outlets

PROJECT Description: Establish a Mobile Market to increase the availability of fresh produce to all tribal communities

Project Tasks:
- Buy Mobile Market Equipment
- Establish a Mobile Market Schedule
- Conduct Mobile Market Sales throughout Growing Season

Grant Management Obligations:
- Submit semi-annual progress report
- Conduct surveys to determine project impact
Native Arts Example

**PROGRAM Mission:**
To preserve the Tribe’s arts and culture by providing training programs, entrepreneurial development, and community events to celebrate the tribe’s culture and traditions.

**PROJECT Description:**
Develop a 1-week Traditional Arts Camp for Tribal Youth

**Project Tasks:**
- Develop the curriculum
- Select instructors
- Recruit campers
- Host the Art Camp

**Grant Management Obligations:**
- Submit semi-annual progress report
- Collect surveys and data to determine project impact
Keys to Success

- Executive Team that supports the Project and clearly defines the “why”

- An efficient game plan that lays out the sequence of events and clearly defines “who will do what by when?”

- An informed and capable staff able to perform the necessary tasks

- Regular communications and monitoring with adjustments as needed
What is Project Management?

The application of *knowledge, skills, tools, and techniques* to project activities to meet the project requirements.

The *strategic competency* that enables organizations to implement strategies and deliver expected benefit.

Considered a *core competency* to achieving your organization’s strategic outcomes.

FACTOID:

*Only 42% of organizations report high alignment of projects to organizational strategy*  
**Source: PMI**
Quick Survey....

How many of you believe your grant project is ALIGNED with your PROGRAM STRATEGY?
How much time should you spend planning your project?
Projects are Ranked Based on 2 Factors

DEGREE OF COMPLEXITY
DEGREE OF COMPLEXITY

1-HOUR ARTS WORKSHOP

1-WEEK KIDS CAMP
RISK

SEASONAL FARMERS MARKET

TRIBAL GROCERY STORE
Develop a formal PM plan if...

✓ More than 1 person will need to be involved

✓ The total project involves multiple steps and will take more than a month

✓ There is any need for sequencing
Bottom line: *Trust Your Gut*

“The best predictor of future behavior is past behavior.” Mark Twain
Quick survey....

How many of you are able to implement ALL of your grant projects ON TIME and WITHIN BUDGET?
An Example

Project: **Launch a Mobile Farmers’ Market**

Grant Award = $30,000

Total Project = $60,000

Requires time from **1 Project Manager and 1 Staff Member**

Requires a “partnership” with **1 Tribal Department** to complete

Using the services of **1 Consultant**
An Approach

**Step 1**: Executive Team Meeting

**Step 2**: Kick-off meeting with Key Stakeholders

**Step 3**: Develop an Action Plan

**Step 4**: Develop a Communications Plan

**Step 5**: Implement Project

**Step 6**: Hold Recurring Meetings, Monitor Progress, and Adjust As-Needed

**Step 7**: Review and Praise
Step 1: Executive Team Meeting

Executive(s) meet with Project Manager to define:

Review Grant Award & Scope of Work

Clearly define how this Project fits into your Program Strategy (define “why”)

Success criteria
  ◦ Time vs. quality vs. money

Identify key stakeholders

Identify other resource needs

Identify and discuss risks

Develop an Executive Team Communication Plan
Agree on Success

Cost  Time  Quality

Define #1 then #2
For Example...

OLYMPICS

TIME

NUCLEAR POWER PLANT

QUALITY
Identify & Discuss Potential Risks

Is there an election happening within your project timeframe that could impact project support?

Is there a need for a land lease that requires Tribal or BIA approval?

Do you need to get competitive proposals that require formal announcements and reviews?

Does this project rely on performance by another Department or Program that you do not supervise?

**Discuss ways to mitigate these risks**
Step 2: Host a Kick-off Meeting with Stakeholders

Develop (or update) an Action Plan

- List the tasks
- Estimate times and costs for each
- Assess dependencies/sequencing
- Assign “task ownership” and start dates

Develop a Communications Plan

- Define routine communication methods/frequency
- Set recurring meeting schedule (if needed)
<table>
<thead>
<tr>
<th>Objective / Activity</th>
<th>Responsible Party (s)</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
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</thead>
<tbody>
<tr>
<td>Hire Local Foods Ambassador [ Pilot Project]</td>
<td>General Manager (GM)</td>
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<td>Conduct a Community Survey to Identify Food Needs [LFA]</td>
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<td>Develop Plan to Accept Low-income Food Benefits [GM]</td>
<td>GM/LFA</td>
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<td>Plant Crops to Serve Community Needs [GM/LFA]</td>
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<td>Finalize Food Access Policies [TSA, Farmers Market, You Pick, etc.]</td>
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<td>On-the-Job-Training for Local Foods Ambassador [GM]</td>
<td>Field Coordinator (FC)</td>
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<td>Seasonal Harvest #1 [GM/LFA]</td>
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<td>Post-Season Community Survey [LFA]</td>
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<td>Adjust as needed, Plant Fall Cross [FC/LFA]</td>
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<td>Seasonal Harvest #2 [LFA]</td>
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<td>Install Pike Ice Maker for Winter Cross [LFA]</td>
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<td>Seasonal Harvest #3 [LFA]</td>
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<td>Objective 2: Operate Mobile Market</td>
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<td>Develop Season 1 Market Schedule [GM/LFA]</td>
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<td>Post Schedule Online and in Community News [LFA]</td>
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<td>Finalize Internal Control Procedures [Accounting] [GM/LFA]</td>
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<td>Review Success and Adjust as Necessary [GM/LFA]</td>
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<td>Operate Mobile Market Season 3 [LFA]</td>
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<td>Objective 3: Student and/or Low-income Family Farm Tours</td>
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<td>Develop Student Tour Schedule [General Manager]</td>
<td>General Manager</td>
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<td>Finalize Vendor Policies [Food Safety Regulations Compliance]</td>
<td>General Manager</td>
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<td>Develop Handout Materials and Get Printed [GM]</td>
<td>General Manager</td>
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<td>Conduct Student Tours throughout growing season [GM]</td>
<td>General Manager</td>
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<tr>
<td>Conduct Family Tours throughout growing season (scheduled) [GM/Field Supervisor]</td>
<td>GM/Field Supervisor</td>
<td>X</td>
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<td>Collect customer attitude and awareness survey [Dependency Driver]</td>
<td>Delivery Driver</td>
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<tr>
<td>Review and adjust as needed [Dependency Driver]</td>
<td>Delivery Driver</td>
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<td>Progress Reporting to Host Entities [X]</td>
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Action Planning 101

*In a brainstorming session (or individually) make a list of all tasks that need to be accomplished*

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Description</th>
<th>Duration</th>
<th>Start Date</th>
<th>End Date</th>
<th>Owner</th>
<th>Budget</th>
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Granularity – How much detail?

**EXAMPLE 1**

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<tr>
<th>Task Name</th>
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<tbody>
<tr>
<td>Hire Local Food Ambassador</td>
<td>Recruit and hire an experienced farmer as a LFA</td>
<td>2-months</td>
<td>Jan</td>
<td>Feb</td>
<td>Project Manager</td>
<td>$500 (classified ad in local newspaper)</td>
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**EXAMPLE 2**

<table>
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<tr>
<th>Task Name</th>
<th>Description</th>
<th>Duration</th>
<th>Start Date</th>
<th>End Date</th>
<th>Owner</th>
<th>Budget</th>
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</thead>
<tbody>
<tr>
<td>Job Description</td>
<td>Develop a Local Food Ambassador Job Description</td>
<td>1 week</td>
<td>1/1</td>
<td>1/7</td>
<td>Project Manager</td>
<td>$0</td>
</tr>
<tr>
<td>Advertise</td>
<td>Post Job Announcement in Local Newspaper</td>
<td>4 weeks</td>
<td>1/8</td>
<td>2/7</td>
<td>Office Manager</td>
<td>$500</td>
</tr>
<tr>
<td>Short List</td>
<td>Review and Screen Applications and Select Short-List</td>
<td>1 week</td>
<td>2/8</td>
<td>2/15</td>
<td>Project Manager</td>
<td>$0</td>
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<tr>
<td>Interviews</td>
<td>Conduct Interviews</td>
<td>1 week</td>
<td>2/16</td>
<td>2/23</td>
<td>Project Manager</td>
<td>$0</td>
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<tr>
<td>Hire</td>
<td>Select Top Candidate</td>
<td>1 week</td>
<td>2/24</td>
<td>3/2</td>
<td>Project Manager</td>
<td>$0</td>
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Avoid the “O-word”: Ongoing

Divide tasks down until:

✓ You can estimate a start and end
✓ No overlap
✓ Accountability to one person or skill group, and
✓ Possibility of monitoring progress closely (weekly?)
## Granularity – How much detail?

### EXAMPLE 1

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<td>2/8</td>
<td>2/15</td>
<td>Project Manager</td>
<td>$0</td>
</tr>
<tr>
<td>Interviews</td>
<td>Conduct Interviews</td>
<td>1 week</td>
<td>2/16</td>
<td>2/23</td>
<td>Project Manager</td>
<td>$0</td>
</tr>
<tr>
<td>Hire</td>
<td>Select Top Candidate</td>
<td>1 week</td>
<td>2/24</td>
<td>3/2</td>
<td>Project Manager</td>
<td>$0</td>
</tr>
</tbody>
</table>
Common Elements in Action Plans

Sign contracts with vendors, consultants, etc.

Sign MOUs with key tribal departments/programs

Develop impact evaluation methods, conduct surveys, etc.

Submit reports to FNDI as required by Grant Award Agreement

Note: Don’t forget to include “wait”, “receive approval”, and “decide” since these tasks take time and can delay a project.
Quick survey...

Do you regularly use a **written communications plan** when managing your projects?
“Unfortunate byproduct of today’s rapid-fire paced business environment, but reality is communication often falls to the bottom of the to-do list. Meetings get canceled, reports get ignored, and questions go unasked.” – PMI Research Study 2015

“Ineffective communication is to blame for more than 50% of projects that fail to meet business goals.” – PMI Research

“A good communications process keeps stakeholders engaged and project teams motivated.” – Graham Colborn, PMP
High-performing organizations – those that average 80% of projects on time, on budget, and in-line with goals – are 2x as likely to use formal project communication plans – *PMI Research 2015*
Formal Communication Plan

1. What needs to be communicated & to whom?
2. How often?
3. In what format?
4. Why are they necessary?
   - As part of initial Project Management, the PM needs to explain when and how the communication strategy will take place and why they need to be done. Explaining “why” is critical to get buy-in.
Poor Communication Examples

Executive Team is unable to explain how the Project supports the Program’s strategic objectives...why are we doing this?

Project Manager can’t stop planning, and outlining every single step in excruciating detail.

Early on in the project Team Meetings get canceled because “everyone is busy” and they never get rescheduled.
## SAMPLE COMMUNICATIONS PLAN

<table>
<thead>
<tr>
<th>Type</th>
<th>Objective</th>
<th>Medium</th>
<th>Frequency</th>
<th>Audience</th>
<th>Owner</th>
<th>Deliverable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Team Planning Meeting</td>
<td>Assign Project Manager, Determine Success Criteria, ID Key Stakeholders, ID Risks, Clearly Define the “why”</td>
<td>Face to face</td>
<td>Once</td>
<td>Tribal Administration, Program Manager, Project Manager</td>
<td>Program Manager</td>
<td>Agenda Meeting Minutes</td>
</tr>
<tr>
<td>Key Stakeholder Kick-off Meeting</td>
<td>Identify all tasks, durations, and costs Develop Action Plan Develop Communications Plan</td>
<td>Face to face</td>
<td>Once</td>
<td>Project Manager, Key Stakeholders, Staff, Consultant</td>
<td>Project Manager</td>
<td>Agenda Meeting Minutes Action Plan Communication Plan</td>
</tr>
<tr>
<td>Project Status Reports</td>
<td>Report the status of the project including activities, progress, costs and issues</td>
<td>Email</td>
<td>Monthly</td>
<td>Executive Team, Key Stakeholders</td>
<td>Project Manager</td>
<td>Project Status Report</td>
</tr>
<tr>
<td>Project Team Meetings</td>
<td>Review status of the project with the team</td>
<td>Face to face</td>
<td>Quarterly</td>
<td>Project Manager, Key Stakeholders, Staff, Consultant</td>
<td>Project Manager</td>
<td>Agenda Meeting Minutes</td>
</tr>
<tr>
<td>Grant Reports</td>
<td>Submit Grant Progress Reports to FNDI</td>
<td>Email</td>
<td>Semi-Annual</td>
<td>FNDI</td>
<td>Project Manager</td>
<td>Progress Report</td>
</tr>
</tbody>
</table>
Helpful Hint: Do you have a hard time getting attendance at meetings?

...SERVE FOOD
Helpful Hint

Is your Project Manager a “Visionary” that doesn’t naturally focus on the details?

=> Assign an organizer
Quick Survey

How many of you...

ENJOY THE DETAILED WORK OF PLANNING AND MANAGING PROJECTS?
Review

Program: *A group of related projects...* that are managed in a coordinated way to obtain benefits not available from managing them individually.

Project: *Temporary endeavor* undertaken to create a unique product, service, or result with a defined beginning and end achieved either by meeting project objectives/goals or by being terminated due to objectives/goals not being met.

Common Approach:
- Executive Team Meeting
- Host a Kick-off meeting with Key Stakeholders
  - Develop an Action Plan
  - Develop a Communications Plan
- Implement Project
- Hold Recurring Meetings and Monitor Progress
Next Steps

**Week 1: Schedule Executive Team Meeting**
- Assign Project Manager
- Determine Success Criteria
- Identify Key Stakeholders, Risks, and Resources

**Week 2: Host Kick-off Meeting with Key Stakeholders**
- Develop an Action Plan
- Develop a Communications Plan

**Week 3: Attend FNDI Webinar #2 – Feb. 16th: Project Implementation & Monitoring**
Thank You!

John Hendrix
Director of Economic Development
john.hendrix@choctaw.org
601.416.0378