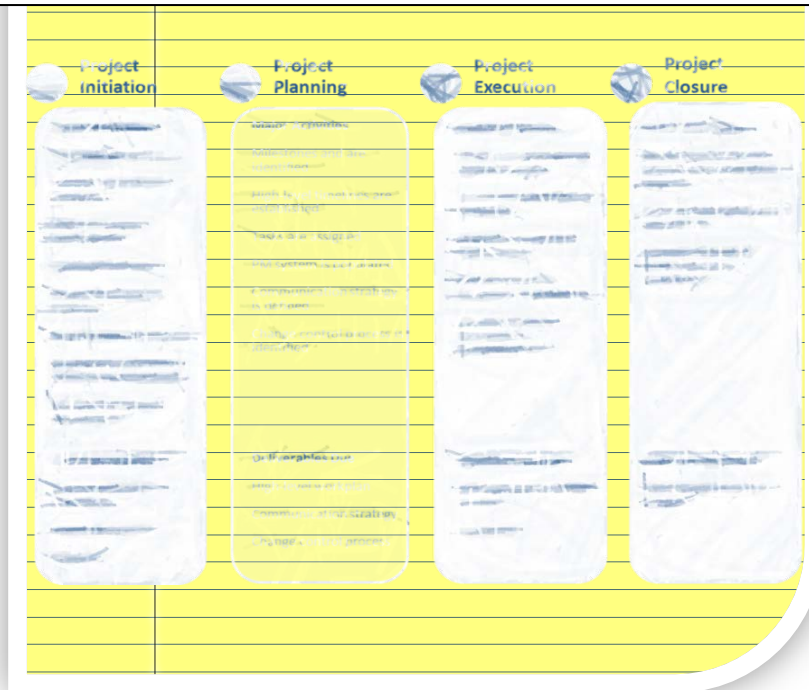


PROJECT MANAGEMENT ^{LITE}

Training Manual for Project Managers and Team Members



Fostering a culture of high purpose, accountability & accomplishment

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INTRODUCTION

Traditionally, project management has been used in the fields of information technology and engineering in order to achieve specific goals on-time, on-budget, and to the customer's satisfaction. Although we will not implement a methodology as rigorous as the ones used in these fields, we have developed a "lite" methodology that will allow us to achieve similar results. In addition to this methodology, the WVU Health Sciences Center has also purchased a software application that will allow Project Managers to organize and track their project(s). A separate manual and training class will be provided with regard to the use of this software.

This manual outlines the project management methodology that has been developed for the West Virginia University Health Sciences Center. The first part of the manual focuses on key definitions. The second part of the manual is an overview of the HSC Project Management ^{Lite} (PM ^{Lite}) methodology.

The implementation of the project management mythology and Bamboo software application are in direct support of the WVU Health Sciences 2016 Strategic Plan goal to - Foster a culture of high purpose, accountability & accomplishment.

Figure 1 is a screen shot of the HSC Strategic Plan website
<http://www.hsc.wvu.edu/hsc2020/>

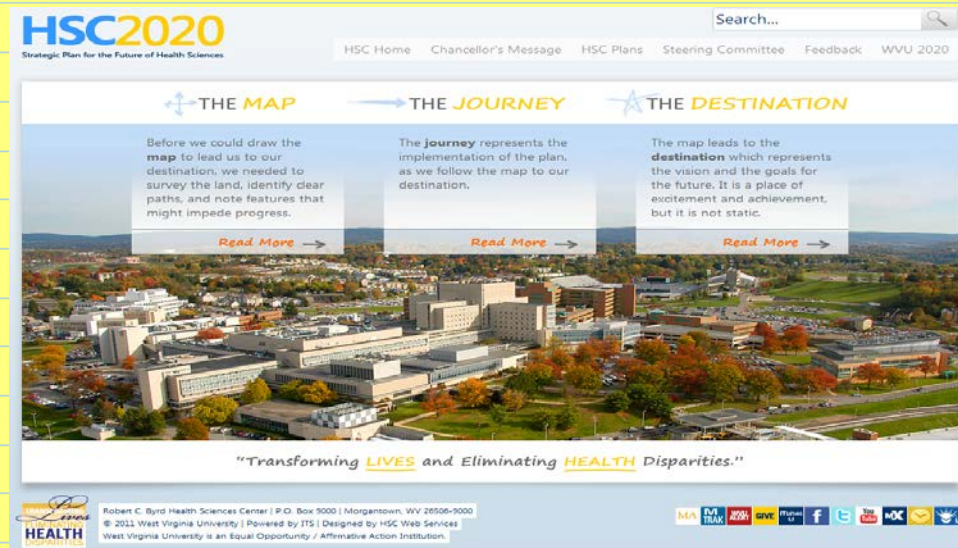


Figure 1: HSC Strategic Plan Website

GENERAL DEFINITIONS

What is a project?

A project is a temporary endeavor with a defined beginning and end (usually time-constrained, and often constrained by funding or deliverables), undertaken to meet unique goals and objectives, typically to bring about beneficial change or added value. At the WVU Health Sciences Center a project must be at least 40 hours of work. If the defined work is less than 40 hours, the project management methodology does not need to be followed.

Examples of projects include: designing and implementing a new educational program, installing a new computer system, and submission of an institution-wide grant. Projects can involve one team member or many, and the budgets can range from zero to millions of dollars. Projects can originate in any WVU Health Sciences School.

Reasons why projects fail to be implemented:

- Incomplete, ambiguous, inconsistent specifications
- Poor (NO!) planning and/or estimating
- No clear assignment of authority and responsibility
- Not enough -- or wrong! -- user involvement
- Lack of adequate tools and techniques
- Dependence on external sources (vendors, subcontractors)

The temporary nature of projects stands in contrast with business as usual (or operations), which are repetitive, permanent, or semi-permanent functional activities to produce products or services. In practice, the management of these two systems is often quite different, and as such requires the development of distinct technical skills and management strategies. For example, the management of on-going committee meetings, monthly monitoring of financials and recruitment of faculty, are not considered projects.

What is project management?

Project management is the discipline of planning, organizing, securing, and managing resources to achieve specific goals. The tool used by WVU Health Sciences to manage projects is the Bamboo software application.

What are the benefits of implementing project management?

The benefit of using project management is that it allows our institution to proactively monitor projects throughout the year - instead of waiting until the end of the year to

determine what we have not accomplished. It also gives project managers the appropriate tools so they can accomplish their goals in an effective manner. Other benefits include:

- Ensures appropriate resource planning
- Proactively identify project constraints and issues
- Reduces re-work and/or elimination of work on projects that are never completed
- Tracks and monitors projects so that they are completed within defined time frames

What is a project management methodology?

A methodology for managing a project is a logical step-by-step process for successful planning, control and delivery of the project. Typically a methodology in project management describes every step in depth, so that a project manager will know what they will need to do in order to deliver and implement the project on time, on-budget and to the customer's satisfaction. The project management methodology developed for the WVU Health Sciences Center is a streamlined approach due to the types of projects that will be managed.

Key terms used in a project management methodology:

Phase - major grouping of work

Activities - logical work within a phase

Task - actual work to be completed within each activity

Milestone - check points marking the completion of key work

Deliverable - Documentation of key work. A deliverable could be a report, a document, a server upgrade or any other building block of an overall project.

PROJECT IDENTIFICATION & APPROVAL PROCESS

Strategic Planning Projects

Annually, projects will be identified that directly support the HSC 2020 Strategic Plan. The identification and approval of these projects will occur in conjunction with the annual budget process. Once projects are identified, a Project Sponsor (senior HSC leader) and project manager will be assigned and the project will be tracked via project management software. In addition, all project managers will be required to attend a project management class in which the HSC project management methodology as well as software functionality will be reviewed.

PROJECT MANAGEMENT ^{Lite}

The project management methodology developed for the WVU Health Sciences Center is a streamlined four phase process. The PM ^{Lite} methodology only includes those phases and deliverables necessary to successfully complete the types of projects that are typical for an academic health system. While developing the methodology careful attention was placed on eliminating “busy work” and focusing on only those tasks that would help to deliver the project on-time, on-budget, and to the customer’s satisfaction.

Figure 2 summarizes the project management methodology that will be deployed at the HSC. The intent of deploying a lite project management methodology is to create some structure with regard to project management while avoiding an onerous process for the project managers. Electronic templates will be developed for each of the deliverables listed below.

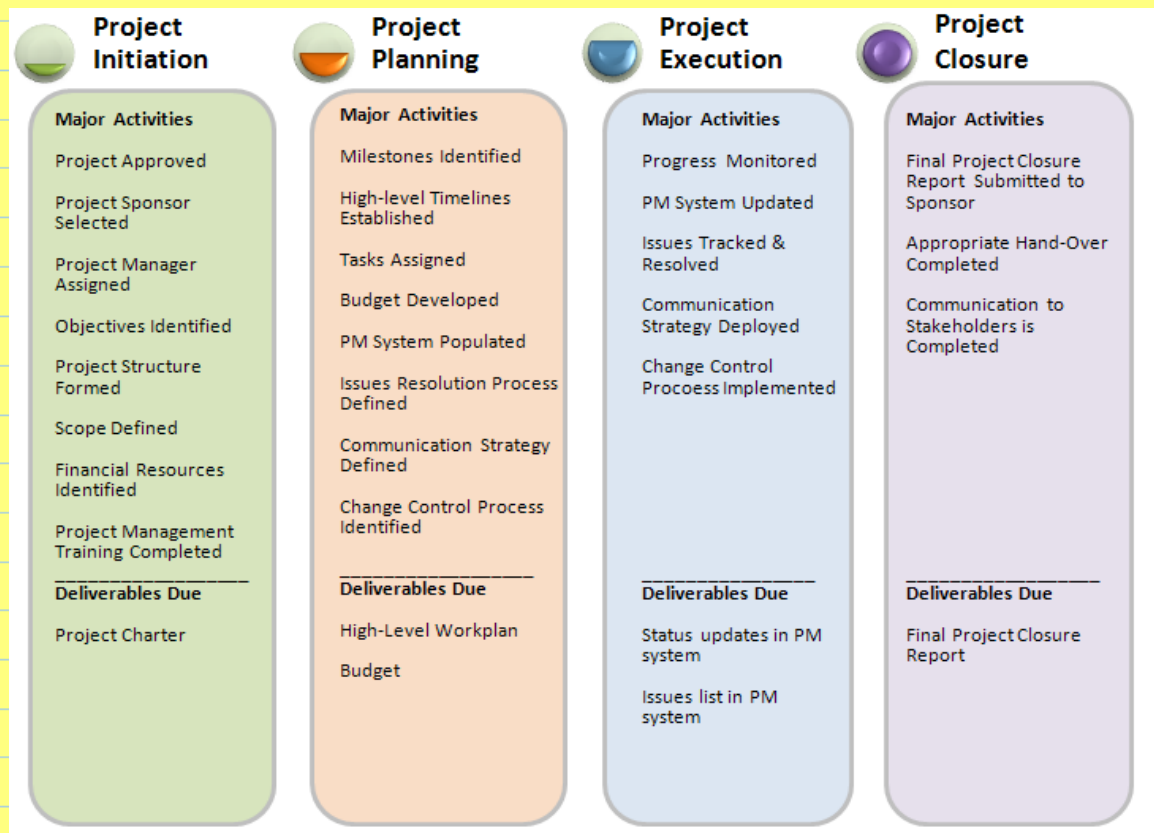
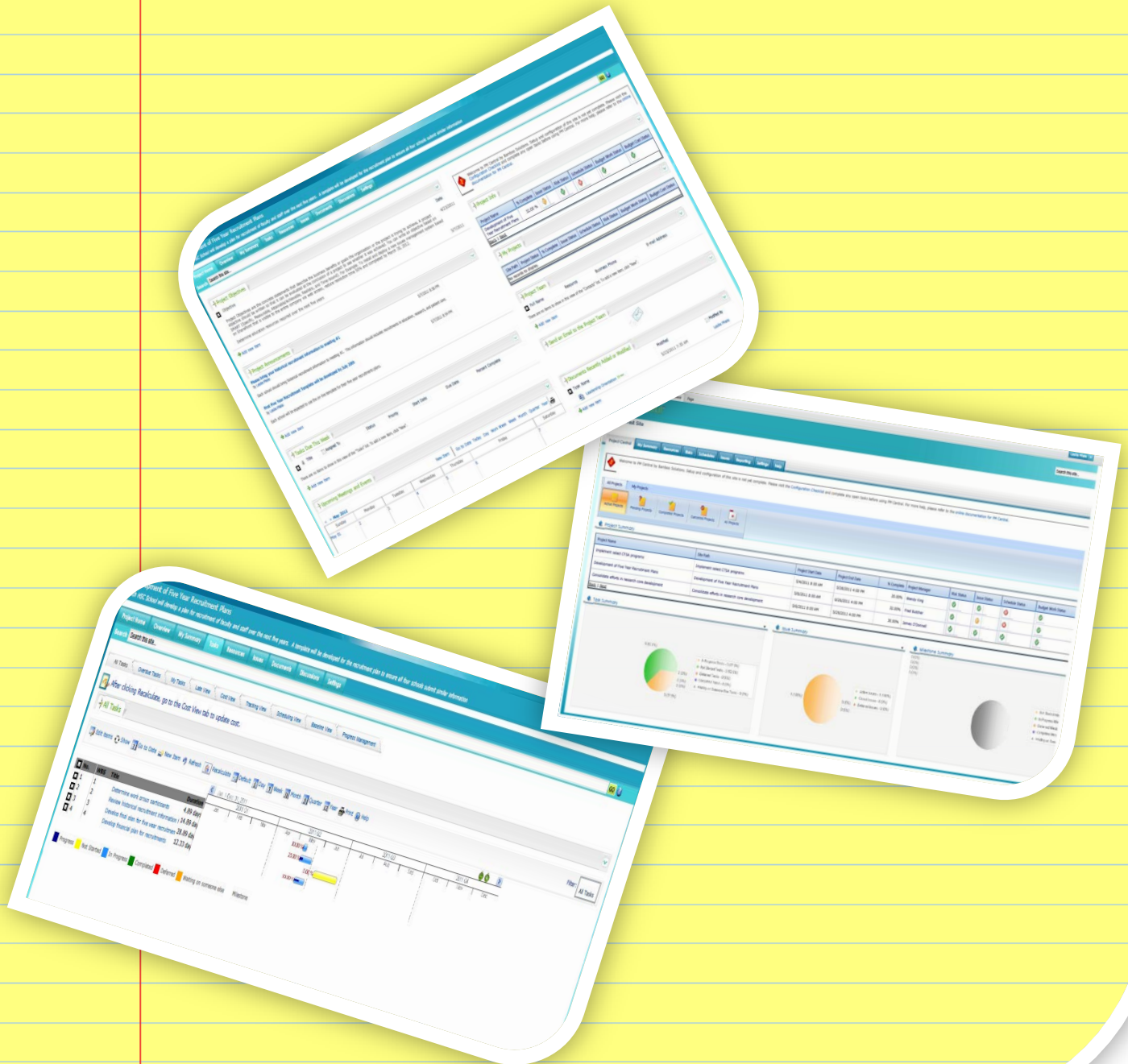


Figure 2: HSC Project Management Methodology

For monitoring and tracking purposes, each project manager will be required to up-date their respective project information via the project management system a minimum of once a month. An auto generated email will be sent to each project manager as a reminder. It will be the responsibility of the project sponsor to ensure that these updates occur on a regular basis for all their assigned projects. The status of all active projects will be reviewed at Senior Management and Executive Committee meetings



PHASE 1 - INITIATION

The initiation phase determines the nature and scope of the project. If this phase is not performed well, it is unlikely that the project will be successful in meeting the business’s needs.

Major Activities

1. Project Approved

The process of identifying and approval of a project is summarized on page 6.

2. Project Sponsor Selected

A project sponsor will be a senior executive at the WVU Health Sciences Center who is responsible ultimately for the success of the project.

The responsibilities for which the sponsor is accountable for include:

- Ensures that the project is aligned with WVU Health Sciences Center strategy and direction
- Assists the project manager with issues resolution
- Ensures that the project stays on schedule, on-budget, and meets customer’s satisfaction
- Approves (or seeks approval) of changes in project schedule, budget, or goals/objectives
- Provides timely decisions to the project manager
- Clarifies business priorities and strategy
- Provides required resources for the completion of the project
- Supports the project manager(s)
- Directs stakeholder communication

3. Project Manager Assigned

A project manager is the person responsible for accomplishing the stated project goals/objectives. Key project management responsibilities include creating clear and attainable project objectives, building the project requirements, and managing the triple constraints for projects, which include cost, time, and quality. A project manager should deliver a project on time, within budget, and according to specifications.



Project Initiation

Major Activities

Project Approved

Project Sponsor Selected

Project Manager Assigned

Objectives Identified

Project Structure Formed

Scope Defined

Financial Resources Identified

Project Management Training Completed

Deliverables Due

Project Charter



Project Initiation

Major Activities

Project Approved

Project Sponsor Selected

Project Manager Assigned

Objectives Identified

Project Structure Formed

Scope Defined

Financial Resources Identified

Project Management Training Completed

Deliverables Due

Project Charter

A project manager often represents their constituents and has to determine and implement their exact needs - based on knowledge of the group they are representing. The term and title 'project manager' has come to be used generically to describe anyone given responsibility for completing a project. However, it is more properly used to describe a person with the full responsibility and level of authority required to complete a project. If a person does not have high levels of both responsibility and authority, then they are better described as a project administrator, coordinator, facilitator or expeditor.

The responsibilities for which the project manager is accountable include:

- Preparing and defining the project scope of work, timeline, financial plan, and deliverables
- Identifying project team and respective roles and responsibilities
- Identifying the resources requirement
- Managing all aspects of the project plan and budget
- Coordinating directly and indirectly with project staff to ensure successful completion of the project
- Tracking project deliveries using project management tools
- Resolving, tracking and escalating critical issues
- Reporting on project progress and communicating relevant information

4. Objectives Identified

Objectives are statements about what the organization hopes to achieve by implementing the project. Objectives should become the basis of the project plan.

5. Project Structure Formed

The make-up and type of Project Teams will depend on the size and scope of the project. A large scale project may have a Steering Committee as well as a Project Team; whereas a small project may only elect to form a Project Team. The Project Team – is a group composed of people who will actually do the project work. The Project Steering Committee

is a group composed of the Project Sponsor, senior leadership, and project manager. This committee oversees the project and is responsible for ensuring the project progresses as planned and that all open issues are addressed. Additionally, the committee approves scope and budget changes.

Each committee and team developed for the project should be identified in the scope document noting the purpose for the committee, the membership, time commitment and responsibilities.

6. Scope Defined

The scope of a project refers to the work that is required to complete the project successfully. Scope creep occurs when the scope of a project keeps growing after it is initially agreed upon. This affects all aspects of a project (schedule and resources) and should be avoided.

7. Financial Resources Identified

Based on the scope of the project, financial resources need to be tentatively identified and secured for the project. If financial resources are required, a budget needs to be developed and approved. Actual development of the budget would occur during the planning phase of the project.

8. Project Management Training Completed

All project managers and project team members must be trained in the HSC project management methodology and the Bamboo software application before the Planning Phase can begin.

Deliverables Due

An electronic template will be provided for the project charter. This template is available in the Bamboo project management system under the documentation tab.



Project Initiation

Major Activities

Project Approved

Project Sponsor Selected

Project Manager Assigned

Objectives Identified

Project Structure Formed

Scope Defined

Financial Resources Identified

Project Management Training Completed

Deliverables Due

Project Charter

Project Initiation

Major Activities

- Project Approved
- Project Sponsor Selected
- Project Manager Assigned
- Objectives Identified
- Project Structure Formed
- Scope Defined
- Financial Resources Identified
- Project Management Training Completed

Deliverables Due

Project Charter

PROJECT CHARTER

Project Name			Project Type			HSC School/Unit		
Project Description								
Project Sponsor						Project Manager		
Project Objectives								
Project Structure/Team(s)								
Project Management training completed? Yes <input type="checkbox"/> No <input type="checkbox"/>			Project set-up in Bamboo? Yes <input type="checkbox"/> No <input type="checkbox"/>			Project team access to Bamboo? Yes <input type="checkbox"/> No <input type="checkbox"/>		
Project Scope								
Project Budget								
Dependencies on other projects								
Estimated start date?			Estimated completion date?			Estimated effort in hours?		



Project Planning

Major Activities

Milestones Identified

High-level Timelines Established

Tasks Assigned

Budget Developed

PM System Populated

Issues Resolution Process Defined

Communication Strategy Defined

Change Control Process Identified

Deliverables Due

High-Level Workplan

Budget

PHASE 2 - PROJECT PLANNING

The planning phase involves developing a high-level work plan and various strategies to help navigate the project team through the execution phase of the project. This high-level work plan will help the project manager to ensure the project is delivered on time and within budget.

Major Activities

1. Milestones Identified

A milestone is a task of zero duration that demonstrates an important achievement in a project. In other words a milestone is an indication of how a project is progressing – even to those not familiar with the project specifics.

An example of a milestone for a project to create a new center would be the hiring of a center director. There are several tasks that are involved in hiring a center director (writing a job description, forming a search committee, writing the advertisement, posting the position, scheduling interview... etc.); however, all of these tasks are performed in order to hire someone into the position (the achievement).

2. High-Level Timelines Established

Specific tasks and sub-tasks need to be identified for each project milestone. These tasks are action items that need to be completed in order for the milestone to be achieved. After all tasks have been identified for each milestone – the work should be sequenced in an

appropriate order, duration of each task determined, and associated completion dates assigned to each task and milestone. The table to the right is an example of part of a high-level work plan for the formation of a new center.

Task/ Milestone	Duration	Due Date
1. Recruitment of center director	17 days	May 30th
1.1 Write job description	5 days	May 13 th
1.2 Form search committee	1 day	May 18 th
1.3 Write ad	5 days	May 19 th
1.4 Place ad in agreed upon publications	1 day	May 24 th
1.5 Review CVs	5 days	May 25 th
Center Director Hired (Milestone)	0	May 30th



Project Planning

Major Activities

Milestones Identified

High-level Timelines Established

Tasks Assigned

Budget Developed

PM System Populated

Issues Resolution Process Defined

Communication Strategy Defined

Change Control Process Identified

Deliverables Due

High-Level Workplan

Budget

Determining the duration of tasks is often the most challenging aspect of project management. If there are time constraints associated with a particular project – it is often helpful to work from the due date backwards in assigning due dates and durations of specific tasks.

3. Tasks Assigned

After each milestone and corresponding tasks/sub-tasks are identified with their respective due dates – the person responsible for ensuring the task is completed needs to be assigned. Typically, the project manager should work with the project team to help match the appropriate resource with a specific task. In some cases the project manager may need to assign someone that is not a member of the project team to complete a specific task. Below is an example of a high-level work plan with task assignments.

Task/ Milestone	Resource	Duration	Due Date
1. Recruitment of center director	Betty	17 days	May 30th
1.1 Write job description	Suzy	5 days	May 13 th
1.2 Form search committee	Mary	1 day	May 18 th
1.3 Write ad	Suzy	5 days	May 19 th
1.4 Place ad in agreed upon publications	Suzy	1 day	May 24 th
1.5 Review CVs	Mary	5 days	May 25 th
Center Director Hired (Milestone)		0	May 30th

4. Budget Developed

Based on the milestones and tasks identified a budget should be developed. This budget should build on the work that was done in Phase I – which was more of an estimate since actual tasks were not identified at that point.

5. PM System Populated

Once the Project Charter and High-Level Work Plan have been developed the PM software system can be populated with the appropriate project information. The minimum requirements for what must be documented in the PM software include:

- ✓ Project Objectives
- ✓ Project Team Members

- ✓ High-Level Budget Information
- ✓ High-Level Work Plan (Milestones)

Optional features that can be used at the project manager's discretion include:

- ✓ Issues Documentation
- ✓ Project Announcements
- ✓ Event Scheduling
- ✓ Discussion Board
- ✓ Documentation Storage

Basic project information should be included on the main project screen below represented in Figure 3.

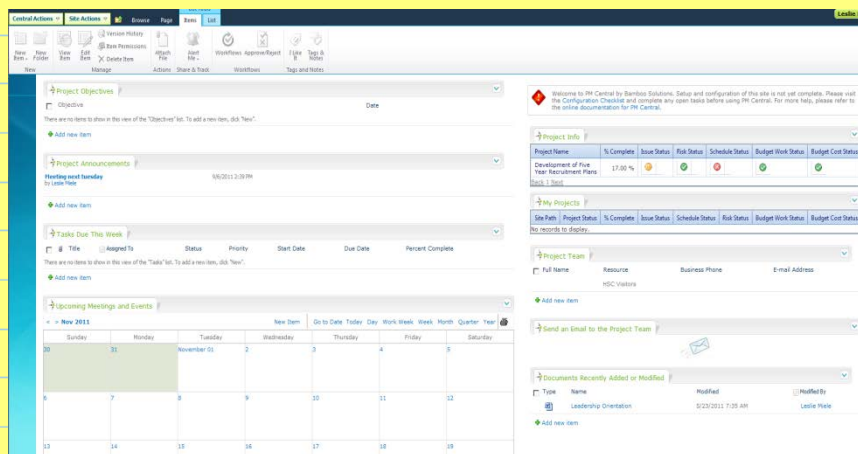


Figure 3: PM Software - Project Main Screen

High-Level Work Plan (Milestone) will be track under the “task” tab (Figure 4)

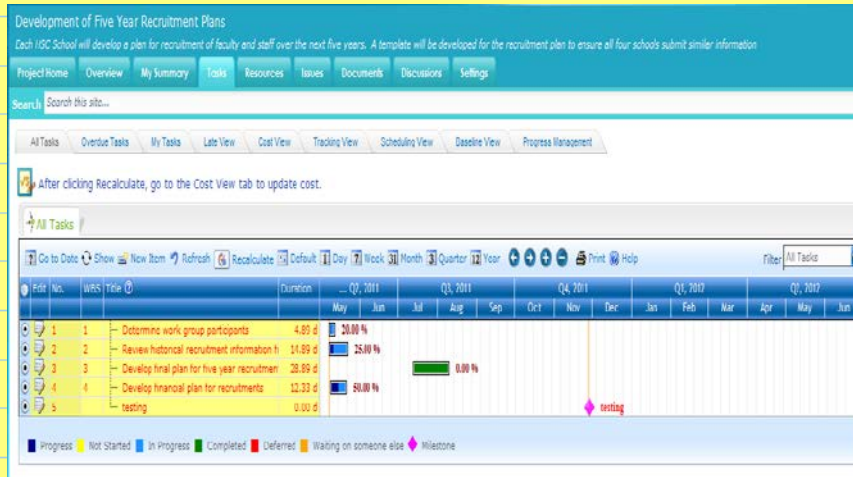


Figure 4: PM Software - High-Level Work Plan



Project Planning

Major Activities

Milestones Identified

High-level Timelines Established

Tasks Assigned

Budget Developed

PM System Populated

Issues Resolution Process Defined

Communication Strategy Defined

Change Control Process Identified

Deliverables Due

High-Level Workplan

Budget



Project Planning

Major Activities

Milestones Identified

High-level Timelines Established

Tasks Assigned

Budget Developed

PM System Populated

Issues Resolution Process Defined

Communication Strategy Defined

Change Control Process Identified

Deliverables Due

High-Level Workplan

Budget

** A training class on the PM software will be available for project managers and team members. The focus of this manual is the project management methodology.

6. Issues Resolution Process Defined

Often during a project issues will arise that need to be resolved before certain tasks can be completed or milestones achieved. If these issues are not managed in an appropriate fashion they could end up delaying the entire project.

In order to avoid project delays, it is important to document issues and who is assigned to ensure its resolution. Open issues should be reviewed with the project team on a regular basis and discussion on potential resolutions should occur. The PM software application does offer an issues tracking tool.

Each project team should discuss how they would like to manage and report issues at an early meeting. This process can be documented in meeting notes – it does not need to be a formal document.

7. Communications Strategy Defined

How and when the project manager and project team will communicate with key stakeholders needs to be discussed and a strategy developed. Providing routine updates with regard to projects creates a sense of transparency within the HSC. The HSC Strategic Plan website <http://www.hsc.wvu.edu/hsc2020/> is one mechanism that can be used to highlight major project achievements.

In addition to the PM software application that will be used by project teams, a list of projects and their status is available on the HSC Strategic Plan website (Figure 5). The status of each project is updated on a quarterly basis and an email with the website link is sent to all HSC faculty staff and students as a reminder to review the site.

Each project team should determine a list of their key stakeholders and how they plan to communication with each group and how often. This strategy can be documented in meeting notes – it does not need to be a formal document.

8. Change Control Process Identified

On some occasions the scope of a project may need to change once the project has been initiated. The problem with scope change is that it often affects the schedule, tasks identified, and budget. Therefore, a process should be identified as to how changes in the project will either be accepted or rejected. This process can be documented in meeting notes – it does not need to be a formal document.

Deliverables Due

A high-level work plan should be developed in the PM software application. If a project budget is required – HSC finance will provide the necessary format for the specific initiative. Sign-off by the appropriate financial officers is required.



Project Planning

Major Activities

- Milestones Identified
- High-level Timelines Established
- Tasks Assigned
- Budget Developed
- PM System Populated
- Issues Resolution Process Defined
- Communication Strategy Defined

Change Control Process Identified

Deliverables Due

- High-Level Workplan
- Budget


The Journey

Annually, projects will be identified that directly support the HSC|2020 strategic plan. The identification and approval of these projects will occur in conjunction with the annual budget process. Below are the **FY2012 HSC strategic planning projects** that serve as the compass on our journey.

Completed
 In Progress
 Not Started

Project/Description	Due	Sponsor	Manager	Status	Map to WVU	Notes
Priority Contribute to the health of West Virginians through <i>leading edge</i> research programs that distinguish WVU HSC						
Schools will submit five year faculty recruitment plans	Q1	Butcher	Sundaram	<input checked="" type="checkbox"/>	Goal 2	
Consolidate efforts in research core development and maintenance – recruit Director	Q1	O'Donnell	O'Donnell	<input checked="" type="checkbox"/>	Goal 2	
Submission of the IDEA-CTR grant application	Q1	Colenda	Sundaram	<input checked="" type="checkbox"/>	Goal 2	
In partnership with the WVU Research Corp, develop a seminar series on commercialization of intellectual property	Q3	O'Donnell	Mustafa	<input type="checkbox"/>	Goal 2	
Implement a formal HSC recognition program	Q4	Griffith	Wonderlin	<input checked="" type="checkbox"/>	Goal 2	

Figure 5: HSC Strategic Plan Website - Project List



Project Execution

Major Activities

- Progress Monitored
- PM System Updated
- Issues Tracked & Resolved
- Communication Strategy Deployed
- Change Control Process Implemented

Deliverables Due

- Status updates in PM system
- Issues list in PM system

PHASE 3 – PROJECT EXECUTION

In the project execution phase the actual project work (tasks/sub-tasks) are completed. This phase is typically the longest in a project management methodology.

In order to monitor and control the project during this phase, the project manager will need to implement the strategies and processes identified during the planning phase. These processes will help to manage the project schedule, budget, scope changes, and issues.

Major Activities

1. Progress Monitored

One of the project manager's major responsibilities is to ensure that the project tasks are completed on time and within budget. It is critical that the high-level work plan and project work be monitored on a regular basis. This review should occur at least every other week. If a task begins to slip off schedule it is better to recognize that sooner versus later.

2. PM System Updates

At least every other week the high-level work plan in the PM software application should be updated. This is critical so that the most recent status of the project is reflected on the various leadership project dashboards. A PM software application training class will provide step by step instructions on how to update the high-level work plan.

3. Issues Tracked & Resolved

Project Manager should implement the issues resolution process that was identified in the planning phase.

4. Communication Strategy Deployed

Project Manager should implement the communications strategy that was identified in the planning phase.

5. Change Control Process Implemented

Project Manager should implement the change control process that was identified in the planning phase.

Deliverables Due

Both the status updates and issues list (Figure 6) can be tracked in the PM software application. Specifics on how to use these functions will be covered in the PM application software training class.

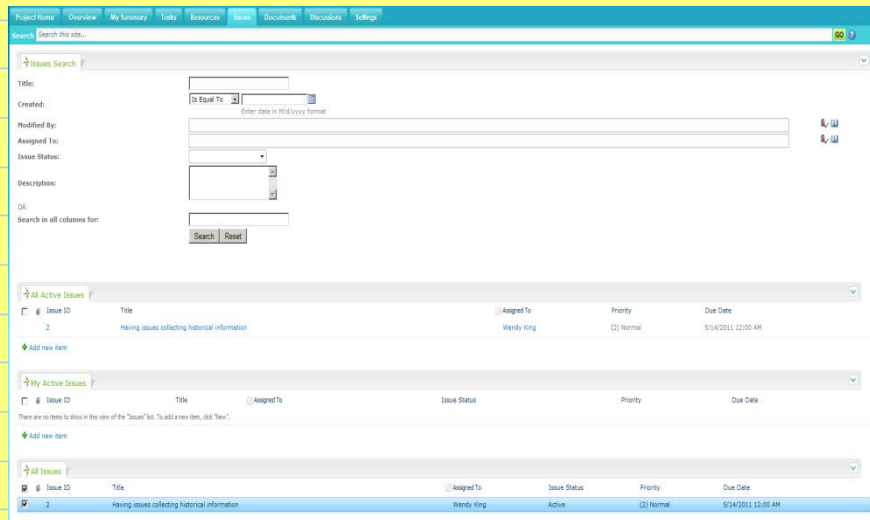


Figure 6: PM Software - Issues Tracking



Project Execution

Major Activities

- Progress Monitored
- PM System Updated
- Issues Tracked & Resolved
- Communication Strategy Deployed
- Change Control Process Implemented

Deliverables Due

- Status updates in PM system
- Issues list in PM system

PHASE 4 – PROJECT CLOSURE

During the project closure phase it is determined if the goals and objectives of the project have been achieved. The project team should also discuss and document “lessons learned” so that others may avoid similar pit falls.

Communication of the actual project outcomes is critical during this phase, as well as identification of indicators that measure the on-going success that may be achieved based on the project.

Major Activities

1. Final Project Closure Report Submitted

The project closure report is the final document produced for the project and is used by senior leadership to evaluate the success of the project. The report should summarize if the project goals and objectives have been met, outstanding issues, lessons learned, and next steps. The project closure report should be submitted to the project sponsor within 30 days of the project’s official completion date.

2. Appropriate Hand-Over Completed

Some projects will have related work that will continue after the close of the project. In this case, it is important that the appropriate “hand-over” is completed. The project manager should meet with the individual responsible for the on-going work to ensure a smooth transition. An example of this type of project would be the creation of a new process. The project would entail designing and implementing the appropriate mechanisms for the process to be successful; however, the on-going monitoring of the process would be “handed-over” after the close of the project. The work then becomes “operational” in nature and should no longer be managed as a project.

Project Closure

Major Activities

Final Project Closure Report Submitted to Sponsor

Appropriate Hand-Over Completed

Communication to Stakeholders is Completed

Deliverables Due

Final Project Closure Report

Project Closure

Major Activities

Final Project Closure Report Submitted to Sponsor

Appropriate Hand-Over Completed

Communication to Stakeholders is Completed

Deliverables Due

Final Project Closure Report

3. Communication to Stakeholders

Once a project is closed it is important to communicate the outcomes of the project to key stakeholders. For example, a project may involve the creation of a new program or center. It is important that after the project is complete that pertinent information is shared with those who may have a vested interest in the work that was completed.

Deliverables Due

An electronic template will be provided for the project closure report. This template is available in the Bamboo project management system under the documentation tab.

Project Closure

Major Activities

Final Project Closure Report Submitted to Sponsor

Appropriate Hand-Over Completed

Communication to Stakeholders is Completed

Deliverables Due

Final Project Closure Report

PROJECT CLOSURE REPRT

Project Name	Project Type	HSC School/Unit
Project Sponsor	Project Manager	
Were project objectives met (provide detail below)? Yes <input type="checkbox"/> No <input type="checkbox"/>		
Lessons learned (provide detail below)? Yes <input type="checkbox"/> No <input type="checkbox"/>		
Project hand-over completed (provide detail below)? Yes <input type="checkbox"/> No <input type="checkbox"/>		
Outstanding issues (provide detail below)? Yes <input type="checkbox"/> No <input type="checkbox"/>		
Communication to stakeholders (provide detail below)? Yes <input type="checkbox"/> No <input type="checkbox"/>		
Actual start date?	Actual completion date?	Actual effort in hours?