



Oncology Nursing Society
Leadership Development Institute

Working Your Project: Moving Ideas Into Action Plans

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Objectives

At the end of this presentation you will be able to:

- Define project management
- Describe the phases of project management
- Utilizes various tools, techniques to turn an idea into an action plan
- Utilize the rule of 10's when developing or managing a project.
- Review the LDI project planning template



Ideas Into Action

- Nurses experienced in turning ideas into action – done daily in patient care
- Nursing process is the system in which we make this happen
- In the non patient care arena project management commonly used.
- Within project management various different tools are used
 - **SWOT analysis**
 - **MS Project**
 - **GANTT charts**



Project Management

- Project management has been around since ancient times
- Project management occurs daily within organizations for both large and small projects
- Most of us use project management skills in daily life
- Project management has distinct phases



Project Phases and Life Cycle

- Phase 1 – Project **definition** phase
- Phase 2 – Project **planning** phase
- Phase 3 – Project **execution**
- Phase 4 – Project **close out**



Phase 1 – Defining the Project

- Projects must be defined clearly
- Project definition will be translated into a Project Charter
 - Project and scope
 - High level outcomes
 - Fit to strategic plan
 - Business Rationale



Phase 1 – Idea Formation Technique

SWOT Analysis

- SWOT – Strengths, Weakness, Opportunities, Threats
- Used in strategic planning, as well as project management
- May be helpful to determine to evaluate idea to determine potential for success



Phase 1 - SWOT Analysis

<p><u>STRENGTHS</u></p> <ul style="list-style-type: none">• Capabilities of self and/or colleagues• Resources available	<p><u>WEAKNESSES</u></p> <ul style="list-style-type: none">• Gaps in capabilities• What needs to change
<p><u>OPPORTUNITIES</u></p> <ul style="list-style-type: none">• What opportunities are available• Interesting or new trends	<p><u>THREATS</u></p> <ul style="list-style-type: none">• Internal / External• Competing timelines or projects



Phase 1 - Project Stakeholders

- Project manager
- Project sponsor or champion
- Core project team
- Customer / Recipient of Project Outcomes
- Any vested/ interested stakeholder
- Functional Managers



Phase 1 – Defining the Project

AKA “How am I going to do this?”

- Write goals for project
 - Breaking down the component parts
 - Avoid gaps and overlaps
- Hierarchy
 - Rank order tactics/activities needed to complete task
- Special situations
 - How to revise the plan
 - How to manage unknown issues/situations



Phase 1 – Criteria for Goal Writing

Goals must be:

- **S**pecific
- **M**easurable
- **A**ttainable/Achievable
- **R**ealistic
- **T**ime-Limited



Phase 1 – Criteria for Goal Writing

Goals must be:

- Specific
- Realistic
- Define time commitment
- Measurable
- Agreed upon by project team
- Define authority or responsibility



Phase 1 – Defining the Project

Estimating Resource Requirements

- Skills/People
 - Identify skills and knowledge needed to perform your project
 - Specify people to work on each activity
- Time
 - Determine how much effort they will have to invest
 - Determine how they will invest time along with other work assignments
- Financial



Phase 1 – Defining the Project

Statement of Work or Project Plan

- Formal project management document that established expectations and agreements about the project
- It is not a contract
- Clarifies responsibilities and working relationships between project stakeholders



Phase 1 - Project Plan Elements

1. Project Title
2. Project Summary
3. Project Assessment
4. Project Design
5. Project Evaluation
6. Impact



Phase 1 - Project Plan

Project Title - brief but descriptive

Project Design

1. Brief description
2. Outcome or objectives of the project
3. Target audience
4. What is the significance of the project
5. How does the project relate to the organization's strategic plan
6. What are the risks and/or rewards



Phase 1 - Project Plan

Project Assessment (SWOT analysis)

1. Internal assessment
2. External assessment

Project Design

1. Team composition
2. Resources needed including budget
3. Implementation Plan and Timeline – include key steps or actions that will be needed to achieve project
4. Communication of project to the organization



Phase 1 - Project Plan

Project Evaluation

How will the expected outcomes of the project be monitored, measured and communicated

Impact

What is the impact of the project to the organization, professional practice and consumers



Phase 2 – Project Planning Phase

Determine the structure

- Centralized
 - One set management procedures
 - Clearly defined relationships - authority
- Functional
 - Separate units addressing same needs
 - No competition to get support
- Matrix
 - Developed to enable quick & efficient response
 - Team members may respond to different managers



Phase 2 – Project Planning

Selecting the Team

Questions to answer when selecting team:

- What skills are necessary
- How much experience is needed
- What interpersonal skills are needed
- How many people necessary



Phase 2 – Project Planning

Imposed Team Members

- Do the best with team assigned to you
- Train members who don't have skills
- Consider use of consultant or outside staff to help with training or to fill in for skill gaps
- Suggest alternative team selection for future projects



Phase 2 – Project Planning

All About the Team

- Confirming team membership
- Assuring others are on board
- Developing the team
- Defining operating processes
- Team phases
 - **Forming**
 - **Storming**
 - **Norming**



Phase 2 – Project Planning Delegation

- Why delegate
- Delegate with confidence
- Holding people accountable
- Dealing with micromanagement



Phase 2 – Project Planning

Establishing Guidance Systems

- Project schedule
 - Key events
 - Report timeline
 - Post project evaluation
- Meeting schedule/structure
- Various options available to keep projects on track



Phase 2 – Project Planning

Guidance Tracking Tools

- Network Diagram – logical representation of activities that define the sequence of work in a project (flowchart)
- Gantt chart – special bar chart that lists activities and activity duration in a chart type fashion



OCN Review Course - Gantt Chart

		January-05					February-05				March-05				
		2	9	16	23	30	6	13	20	27	6	13	19	20	27
Task Name	Duration														
Course Contents															
Develop Progam outline	1 week	→													
Contact Speakers	2 wks		→	→											
Speakers Bio/AV Info	2 wks					→	→								
Handout materials received	4 wks					→	→	→	→						
Copy Handout materials	2 wks									→	→				
Thank you to speakers	1 wk													→	→
Program Logistics															
Program Location	2 wks	→	→												
Meals	3 wks						→	→	→						
Fees to participants	1 wk		→	→											
Develop/Print brochure	2 wks			→	→										
Mail brochure	1 wk					→	→								
Secure AV equipment	1 wk							→	→						
Receive registrations	1 wk									→	→	→			
Hold Course	2 days												→	→	
Course Evaluation															
Summarize evaluations	1 wk														→
Review expenses/income	1 wk														→
Develop final summary	1 wk														→



Phase 2 – Project Planning

Budget Planning

- Ballpark Estimate – gut level feeling about what the project may cost
- Order of Magnitude – use previous experienced with similar project and inflate budget as needed to determine budget
- Detailed expenses – common during the actual execution – outlines actual expenses and income



Phase 2 – Project Planning

Dealing with Unexpected Storms

- Identify possible causes of delays and variances
- Exploring corrective action plans
- Managing change



Phase 3 – Project Execution

Key Traits of Project Managers

1. Enthusiasm for the project
2. Ability to manage change effectively
3. Tolerant attitude towards ambiguity
4. Team building and negotiation
5. Customer first orientation
6. Adherence to business priorities
7. Industry knowledge



Phase 3 – Project Execution Team Meetings

- Kick off meeting
- Regularly scheduled meetings
- Ad hoc team meetings
- Upper management reviews



Phase 3 – Project Execution

Getting Peak Performance

Sustain motivation

- **Desirability**
- **Feasibility**
- **Progress**
- **Rewards Rewards**
- **Punishment**

Tap into sources of power

- **Rewards**
- **Punishment**



Phase 3 – Project Execution

- Planning ready to terminate the project
- Addressing remaining issues
- Terminating team relationships
- Announce end of project



Phase 4 – Project Closeout

- All projects come to an end
- Dissolving a project takes time and planning
- Closing a project should follow a set of pre-determined steps
- Team members will have to be re-integrated in to other tasks



Phase 4 – Project Closeout Post Project Evaluation

Collect the following information:

- Results achieved
- Schedule performance
- Resource expenditures
- Changes in project schedule, budget
- Unanticipated occurrences
- Customer satisfaction
- Management satisfaction



Project Risk Factors

Risk factor – situations that may arise during the project which increase likelihood that project may miss

- **Product**
- **Schedule**
- **Resource targets**



Achieving Peak Performance

Possible Risk Factors

Phase 1 – Project Definition

- Not enough background information was in writing
- No formal cost-benefit analysis
- No formal feasibility study
- Author of the idea was not identified



Achieving Peak Performance

Possible Risk Factors

Phase 1 – Project definition

- Inexperienced staff preparing project
- Project plan not written down
- Part of the plan omitted
- Components of the project were not approved by key audience



Achieving Peak Performance

Possible Risk Factors

Phase 2 – Project Planning

- People assigned to project are not the same as project planners
- No effort made to help team establish/identify to the project
- Procedures for resolving conflict between team members not defined



Achieving Peak Performance

Possible Risk Factors

Phase 3 – Project Execution

- Needs of primary clients change
- Project performance reporting inconsistent
- Key project supporter is reassigned
- Project team members replaced
- Priorities of the organization change



Achieving Peak Performance

Possible Risk Factors

Phase 4 – Project Closeout

- One or more of project drivers does not formally approve the project
- People assigned to new projects before the project is completed



Achieving Peak Performance Risk Management

- Choosing risks to manage
 - Determine likelihood and impact to project
 - Explore consequences of risk
- Developing risk management strategy
 - Minimize chance that risk will occur
 - Develop contingencies
 - Buy insurance



The Rules of 10's

Planning the Project

1. Why is project being done?
2. Who will need to be involved?
3. What results will be produced?
4. What constraints must be satisfied?
5. What assumptions need to be made?



The Rules of 10's

Planning the Project

6. What work must be done?
7. When will you start and end each activity?
8. Who will perform the project work?
9. What other resources will be needed?
10. What could go wrong?



The Rules of 10's

Holding People Accountable

1. Involve people who really have authority
2. Be specific regarding end results, time frames, expected performance
3. Get a commitment
4. Put it in writing
5. Emphasize urgency & importance of the assignment



The Rules of 10's

Holding People Accountable

6. Tell others about person's commitment
7. Agree on a plan for monitoring performance
8. Monitor performance
9. Acknowledge good performance
10. Act as if you have authority



The Rules of 10's

Getting back on track

1. Determine why project got off track
2. Reaffirm key drivers
3. Reaffirm project objectives
4. Reaffirm the activities remaining to be done
5. Reaffirm roles and responsibilities



The Rules of 10's

Getting back on track

6. Develop a viable schedule
7. Reaffirm your personal assignments
8. Develop a risk management plan
9. Hold a mid-course kick off session
10. Closely monitor and control performance of the project



The Rules of 10's

How to be a better project manager

1. Be a “why” person
2. Be a “can do” person
3. Don't assume
4. Say what you mean; Mean what you say
5. View people as allies, not adversaries



The Rules of 10's

How to be a better project manager

6. Respect other people
7. Think “big picture”
8. Think detail
9. Acknowledge good performance
10. Be both a manager and a leader



LDI Project Plan

PROJECT TITLE

PROJECT SUMMARY

1. Brief description
2. Outcome or objectives of the project
3. Target audience
4. What is the significance of the project
5. How does the project relate to the organization's strategic plan
6. What are the risks and/or rewards

PROJECT ASSESSMENT

1. Rationale for the project
2. Internal organization assessment
3. External organization assessment

PROJECT DESIGN

1. Team composition
2. Resources needed including budget
3. Timeline – include key steps or actions that will be needed to achieve project
4. Communication of project to the organization

PROJECT EVALUATION

How will the expected outcomes of the project be monitored, measured and communicated

IMPACT

What is the impact of the project to the organization, professional practice and consumers



Instructions/Expectations of Project Plan

- Project plan will be developed based on submitted project description form
- Small work group sessions will allow fellows consultative assistance with LDI faculty member
- Copies of the LDI project plan will be made prior to departure
- Project plan can be refined/revised during next several months
- Expectation of fellows will be to provide progress reports and updates

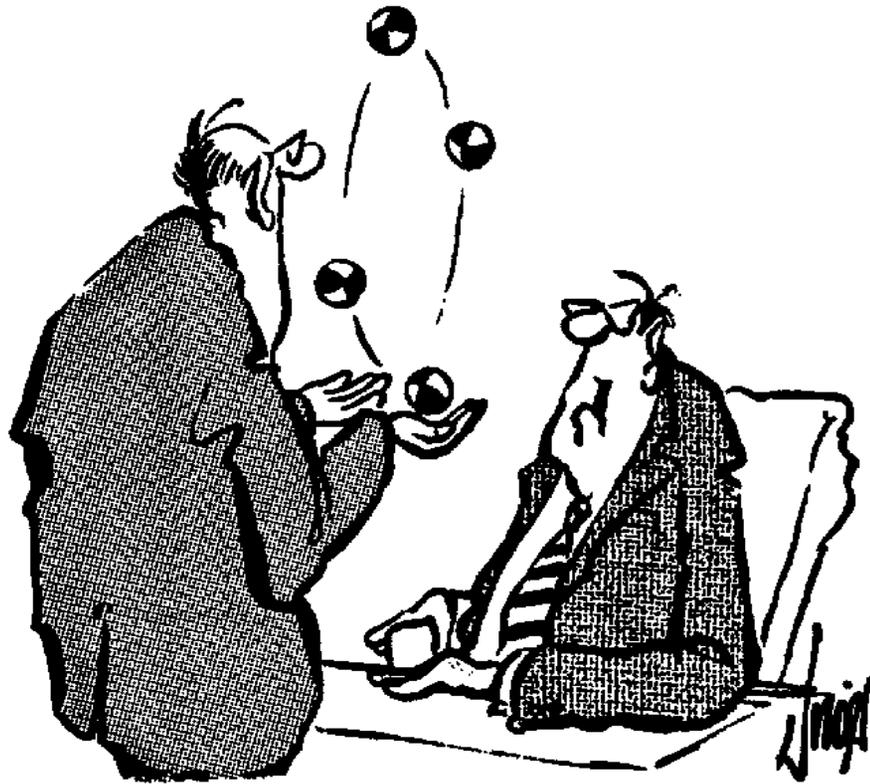


Summary

Project management skills transcend industry boundaries, and add a lot of opportunities for those who are willing to learn the ropes. These additional skills are added job value and security.

Be not afraid of greatness: Some are born great, some achieve greatness, and some have greatness thrust upon them. Wm. Shakespeare, 12th night





"You seem to have the qualifications we are looking for in a project manager."

