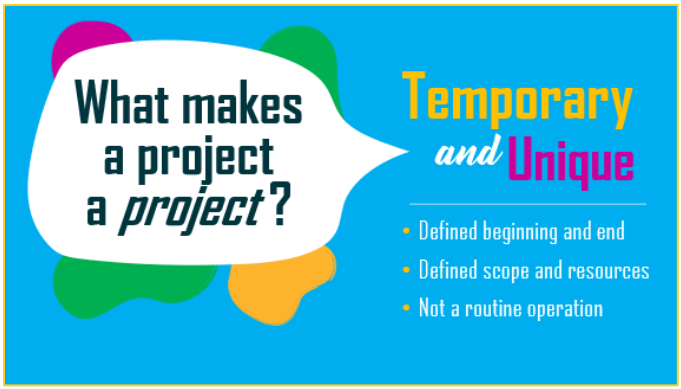
PROJECT MANAGEMENT 101

1. Definition of a 'Project'

What makes a project a project?



We're often asked...what exactly makes a project a project? Consider two words: ***temporary*** and ***unique***.

According to Project Management Institute, or PMI, "a project is a **temporary** endeavor undertaken to create a **unique** product, service or result."

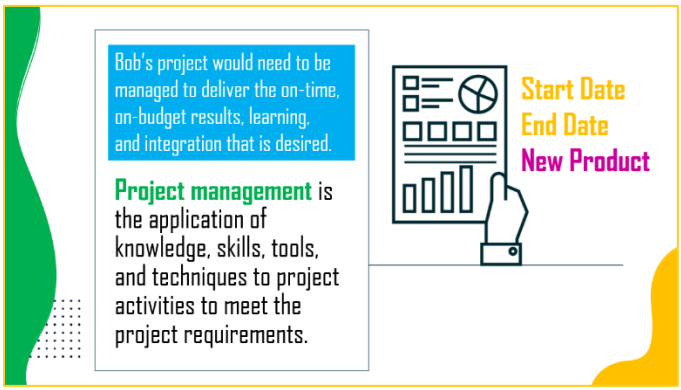
It has a **defined beginning** and **end** in time, and therefore **defined scope and resources**. A project is unique in that it is **not a routine operation**.

NOT A PROJECT - When Bob runs a report on the last day of every month, that *wouldn't* be considered a project because it is simply a routine operation, part of Bob's job.

YES, IT'S A PROJECT - But let's say that Bob's team needs a new way to do its monthly reporting, including a new report and a new reporting procedure...this *is* a project because it has a start and end date, and a new product would be created.

2. Definition of 'Project Management'

What is project management?

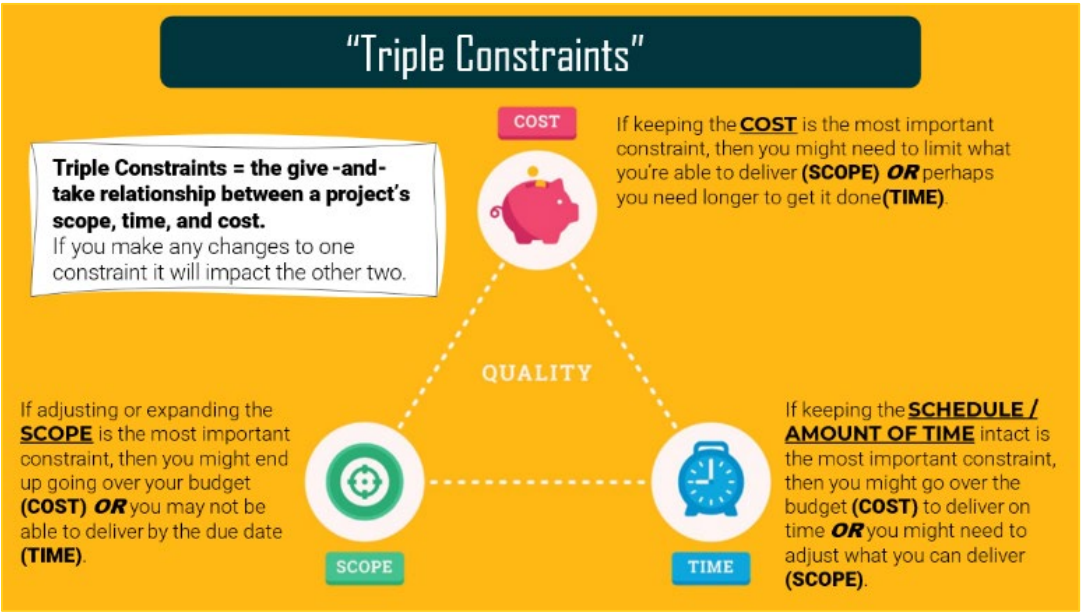


Project management is the application of ***knowledge***, ***skills***, ***tools***, and ***techniques*** to project activities to meet the project requirements. You get to choose how much project management you need to ensure that your project:

- Meets the intended **scope**
- Is delivered **on time**
- Stays within **budget**
- Is integrated/adopted

3. The Triple Constraints of a Project

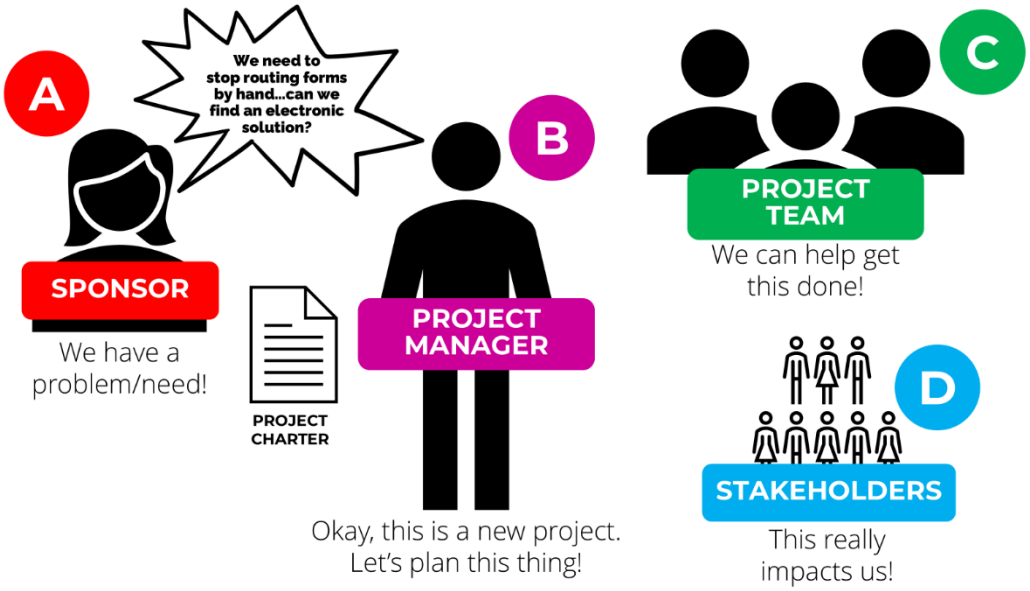
If we run into issues, what's more important...delivering on time, staying within budget, or delivering everything we originally planned?



- **Triple Constraints** = The give-and-take relationship between a project's **scope**, **time**, and **cost**. If you make any changes to one constraint, it will impact the other two.
- The triple constraints are depicted by a triangle with **QUALITY** in the center, and **SCOPE**, **TIME**, and **COST** the three points of the triangle. Scope, time, and cost affect the quality of your project.
- What if we need to make a change to scope, time, or cost? Imagine the triangle is made from a rubber band. If you "pull" on one corner, the other corners are likely impacted. If one constraint is pulled too tightly without adjusting the others, quality may suffer.
  - **"We need to expand the scope."** If adjusting or expanding the **SCOPE** is the most important constraint, then you might end up going over your budget (COST) *OR* you may not be able to deliver by the due date (TIME).
  - **"We need to make the project due date."** If keeping the **SCHEDULE / AMOUNT OF TIME** intact is the most important constraint, then you might go over the budget (COST) to deliver on time *OR* you might need to adjust/reduce what you can deliver (SCOPE).
  - **"We need to stick to our budget."** If keeping the **COST** is the most important constraint, then you might need to limit what you're able to deliver (SCOPE) *OR* perhaps you need longer to get it done (TIME).
  - **Analogy:** Think of planning a dinner party. If you want to cook a fancy meal (scope), but you only have $100 (cost), and guests are arriving in 2 hours (time), something's got to give. You may need to cook a simpler meal, ask guests to bring a dish, increase your budget to order takeout, and/or delay the start time.
- One of the first steps in managing a project well is understanding which constraint is the highest priority. What can't change? What's flexible?
- Changes to the Triple Constraints aren't inherently bad, just be aware that they may require adjustments to the other factors to ensure project success. This illustrates the importance of communicating with the project sponsor to be clear about what's most important and to help manage expectations.

4. Roles & Responsibilities

Who's on a project?



A. SPONSOR. The Sponsor is accountable for the project's success, provides funding and direction, and helps remove roadblocks. The Sponsor champions the project and cares about it the most.

For a large or complex project, the sponsor could be separated into two distinct roles: The **Executive Sponsor** who champions the project at the highest level and provides strategic guidance, and the **Project Sponsor** who manages business decisions and works closely with the Project Manager.

B. PROJECT MANAGER. The Project Manager is responsible for planning, coordinating, and delivering the project on time, within scope, and on budget. The Project Manager leads the day-to-day work, communicates with stakeholders and the Sponsor, manages risks and issues, and ensures the team stays aligned with the project's goals. Core attributes: Organization, communication, people skills, leadership (inspires, guides, builds trust, sees the bigger picture), problem-solving, adaptability, time management, collaborative. Remember that a Project Manager generally should not be assigned tasks that are performed by the Project Team Members.

At the San Diego County Office of Education, the Project Manager role is only assigned to a person in a management position. The role of Project Lead (see below) may be assigned to management and non-management positions.

C. PROJECT TEAM. The Project Team are the staff who perform the work of the project, support the Project Manager in achieving project objectives, and escalate issues as needed. Team members are typically responsible for completing tasks within their area of expertise (**subject matter experts, or SMEs**).

Some projects might benefit from a **Project Lead**, a project team member responsible for coordinating specific project activities and deliverables. The Project Lead might collaborate with the Project Manager on planning; coordinate efforts like documentation, testing, and training; and/or ensure specific parts of the project stay on track.

D. STAKEHOLDERS. The Stakeholders are individuals, groups, or organizations affected by or have an interest in the outcome of the project. Stakeholders might provide input and source information, contribute business knowledge, and/or participate in activities like User Acceptance Testing (UAT) to ensure the project meets user needs.

"Stakeholders" is a Project Management Institute (PMI) term. Other words to describe this audience include **Interested Parties**, **Customers**, and **End Users**.

4. Roles & Responsibilities (Cont'd)

Other roles on a project:

- **TRAINING & SUPPORT.** Team members responsible for preparing end users for successful adoption of the project. They contribute to planning and delivering training, developing support materials, and ensuring users have the resources needed before and after implementation. Their early involvement helps ensure a smooth transition and long-term success.
- **STEERING COMMITTEE.** Some projects might benefit from a Steering Committee, a group of stakeholders who provide guidance, support, and decision-making authority to help move the project forward. The Project Manager consults with them as needed, especially when a decision needs to be made or input is needed from those who represent broader stakeholder interests.
- **CHAMPIONS.** Some projects might benefit from Champions, a group of early-adopter stakeholders who actively support the project by promoting its benefits, identifying potential issues, and helping others navigate change. Champions serve as liaisons between the project team and their departments, answer questions, share feedback, and encourage user engagement to support successful adoption.

Comments:

- The terms *Sponsor*, *Project Manager*, *Project Lead*, and others refer to project roles, not official job titles. One person may take on multiple roles depending on the size and complexity of the project, and someone's day-to-day job title might differ from the role they play on a project. These roles help define responsibilities so everyone knows how they contribute to the project's success.
- Not all projects require all roles! To help you decide, look at your project's scope, time, and cost (the Triple Constraints) as factors to determine how much project management you might need.

5. Common Project Events & Milestones

What does a typical project look like?

LIST OF POTENTIAL THINGS TO MANAGE / DO FOR YOUR PROJECT

EXECUTION PHASE

- Research/Discovery
- Purchasing
- Receiving
- Configuration / Design / Build / Customization
- Testing
- Training
- Go Live Prep
- Go Live / Implementation
- Support / Operationalize

CLOSURE PHASE

- Lessons Learned
- Survey
- Final Report
- Celebration
- Archive
- Sign-off with Sponsor

It is helpful to consider in advance what you will need to manage/do for your project. This is a list of **common project events and milestones**. Some represent entire phases of work (like Purchasing or Testing), while others are specific events that signal key progress points (like Go Live or Celebration).

Please note that not all projects have these events, and some projects might have different events.

6. Common Ways to Manage a Project

Waterfall, Agile, Kanban, Scrum

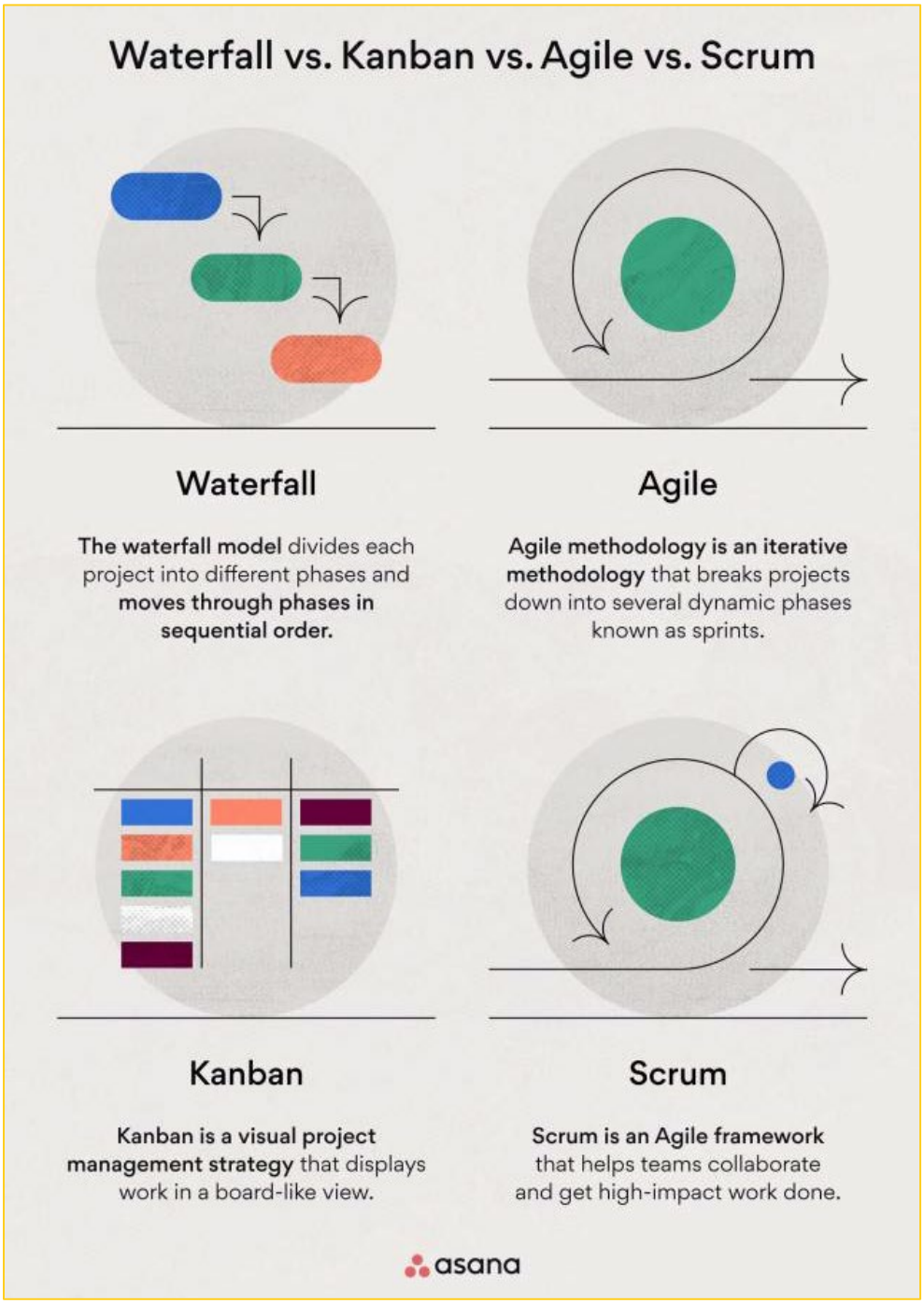


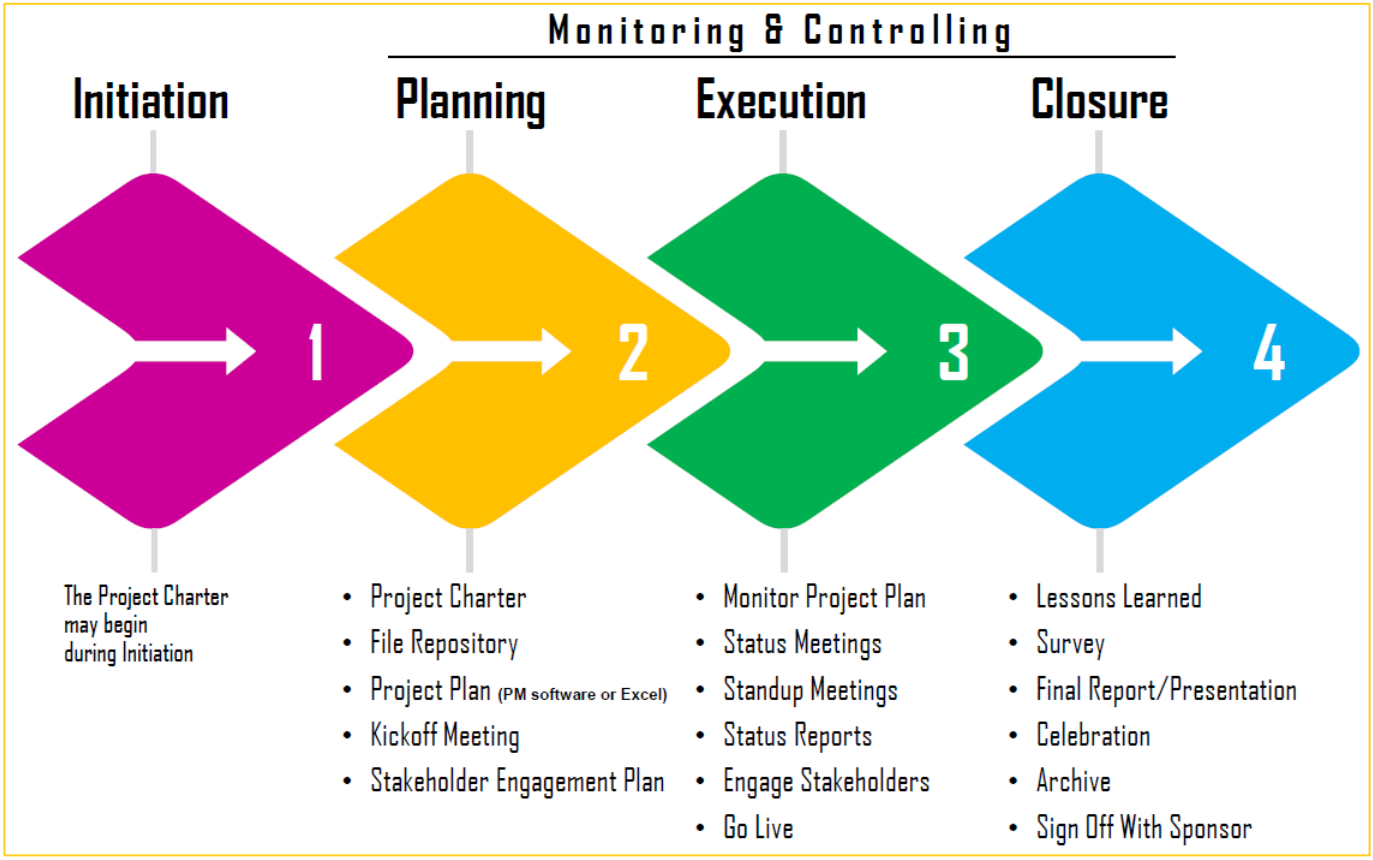
Image source: Asana

There are several ways to manage a project. Traditional methods like **Waterfall** offer structure and predictability, while **Agile** methods prioritize flexibility and fast feedback. Blended models, like *WaterAgileFall* (or *Wagile*) and *Scrumban*, combine the strengths of different approaches. For example, at the San Diego County Office of Education, a project might be mostly Waterfall but includes some Agile elements, like incorporating two-week sprints and standup meetings during the testing phase. What's most important is that you choose an approach that best fits your project needs and adds value.

7. SDCOE's Recommended Approach

Initiation > Planning > Execution > Closure

The Enterprise Project Management Office (EPMO) at the San Diego County Office of Education (SDCOE) developed this streamlined approach to project management, based on Project Management Institute's (PMI) principles.



The four phases of project management are **Initiation**, **Planning**, **Execution**, and **Closure**. **Monitoring and Controlling** occurs throughout.

- **Initiation** is when you are just starting out and exploring whether you will pursue a project.
- **Planning** is a critical part of the process. In our workflow at SDCOE, we typically are working on our Project Charter at the onset of Planning, although it may begin during Initiation. The Project Charter forms the backbone of your project. You use it to get clarity on what the project is and to document as much as you can BEFORE THE WORK BEGINS. Notice the other key activities in this phase: Setting up a file repository, defining/organizing the work to create a project plan, conducting a kickoff meeting, identifying stakeholders and starting a plan to engage with them.
- Your project hits **Execution** when the work begins by the project team. At this point, it becomes important to monitor the tasks, as well as stay connected with the project team. You plan Status Meetings, write and send a Status Reports, and you ensure updates and information are provided to the stakeholders. Lots of activity happens during the Execution Phase, leading up to Go Live. During Execution, build in time for post-implementation support and issues resolution.
- Your project does not end on the day of Go Live. The **Closure** phase is an important bookend to the project. Essentially you do a Lessons Learned Meeting to find out what went well, what can be improved, and focus on continuous improvement. Surveys help us determine if we met our project goals and objectives. This feeds into a final report or presentation for the Sponsor, your Board, or anyone who would benefit from the report. Then a project celebration lets every team member know how they did and share in the success, as well as get invigorated for the next project. Finally, files get archived and all hand-offs are completed, including a sign off with the Project Sponsor.