Introductions to Managing Projects

Theme 5.1
Part 1 of "Managing Projects"

Bonner Community Engagement Curriculum: The 8 Themes Series

BWBRS Description: *This Bonner Curriculum workshop is part one (of 4) of a series for Bonner Scholars and Leaders to enhance their leadership and management capabilities by strategically designing and implementing their own projects.*

Overview: The concepts presented in this workshop are not new to Bonners. Writing goals and objectives, implementing an action plan, and other aspects of managing projects may have been learned in other settings. However, in this workshop, participants have an opportunity to apply basic project management tools and techniques as they clarify concepts, talk with each other in a focused way, and work through relatable case studies. This is an excellent workshop for student who would like to undertake a project in the near future and are seeking to learn and apply essential project management skills.

This session introduces practical ways for participants to explore their goals from the outset of each project and to consider all the factors that may affect its execution. It is part of a series of managing projects modules designed to help participants think critically about the consequence of each project as they analyze and synthesize diverse perspectives. This workshop can help students increase their planning, decision making, organization, and leadership skills. The Managing Projects Series is useful to any Bonner who have the leadership desire to help their community develop, implement, and manage projects, whether the community is a class of students, campus program, or community partners.

Third Year

Key Words: Leadership; planning; decision making; goal setting; organization; communication; volunteer management;

8 Themes: "Third" Year - Fall Semester

Bonner Developmental Connections:

This workshop is excellent for juniors who are planning capacity-building and/or junior/senior capstone projects. It can be done during a Welcome Back Retreat, Class Meeting, or a Mid-Year Retreat. Setting aside a bit more than an hour is best, depending on the number of people. Additionally, this workshop can be done in an All Bonner Meeting, splitting students into mixed groups by class. The activity itself can be repeated.

Bonner/VALUE Rubric Outcomes:

This workshop enable students to explore how they can effectively communicate and employ their leadership management skills to successfully deliver their own project. Students will consider multiple perspectives as they think critically about each decision they make during the PM process.

Workshop Learning Outcomes:
- Participants will understand and be able to do the key steps in developing and managing projects.
- Participants will identify specific stakeholders when setting objectives to ensure the projects receives necessary support and resources.
- Participants will visualize the steps as a process that is sequential, yet somewhat fluid and repetitive.
- Facilitator will describe tools and methods that can be used to better understand how to manage stakeholders for specific projects.

Materials:
- Flip chart (see attachment) for powerpoint `
- Index cards or post-its sticky notes papers
- Everyone should have something to write with (pens, pencils, markers)

How to Prepare:
Prepare yourself to facilitate by reviewing the guide and becoming comfortable with the facilitation process. Since this workshop so directly relates to Bonners taking leads on projects and outreach activities, campus program staff should be involved in the facilitation of this workshop. It is highly recommended that program staff serve as trainers. If your purpose is to train-the-trainers, you may want to make that explicit

during your session. The managing project workshop activities and handouts are necessarily generic and need to be adapted to suit local community and participant needs. Make sure to make a large copy of the board game handout.

Brief Outline:
In this guide, you will find steps for taking a group of participants through the project management activities, which they can replicate to undertake projects. As you select and make modifications to the sessions to fit your participants' needs, try to keep common community stakeholders in mind and encourage participants to share ways to make the content, methods, and materials as accessible and appropriate as possible for the people with whom their projects could affect.

Select a side wall in the main training room and designate the wall as the 9 step process wall. Place a header for each steps.

The one-hour outline has the following parts. Some sections can benefit from longer times, so modify up if you are able. Larger cohorts will require more time for sharing.

1)	Introduction to Project Management	15 minutes
2)	Introduction to Case Study #1	15 minutes
3)	Step 1 — Setting Goals	10 minutes
4)	Step 2 — Stakeholder Analysis	10 minutes
5)	Step 3 — Stakeholder Requirements	10 minutes

	STEP	SYMBOL	QUESTIONS
1	**Set Goal**		WHY are we doing this?
2	**Analyze the Stakeholders**		WHO is impacted, interested, and powerful?
3	**Analyze the Requirements**		WHAT do they require?

Part 1) Introduction
Suggested time: 15 minutes (as you present slides)

This guide provides an introduction to the process involved in project management. It offers a simple but robust and practical framework to help new users get started on managing projects. The steps in this guide can be use on all projects, whatever the industry or environment is to achieve the project objectives.
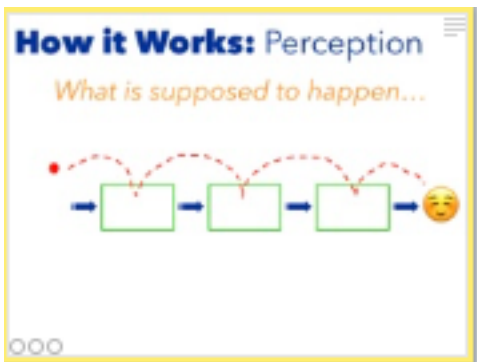
Slide 1

Say: As you take on more leadership roles at your service sites and on campus, we expect you to develop, implement, and manage projects as part of the Bonner developmental journey. This workshop is one of four training sessions that will help you all increase your planning, decision-making, organization, and leadership skills.

Review the workshop learning outcome on <u>page 2</u> of this guide,
Slide 2

?Ask: When you are working on a project, what generally happens to the flow of the project? Then click the slide for the animation to illustrate what ideally supposed to happen in a fantasy world.
Say: The perception is that everything will go according to plan and the project goal will be achieved.

Slide 3

Say: In reality, there are many challenges and obstacles, from work-a-rounds to rework, and delays. These things happen when managing projects.
?Ask: What are your own experience of managing projects? What went well? What went wrong? Why do you think it went well or wrong? Did you follow a series of steps or more ad hoc?

Slide 4

Say: There are steps you can take to minimize challenges and obstacles that may arise when managing projects and we are going to learn some of those steps today.
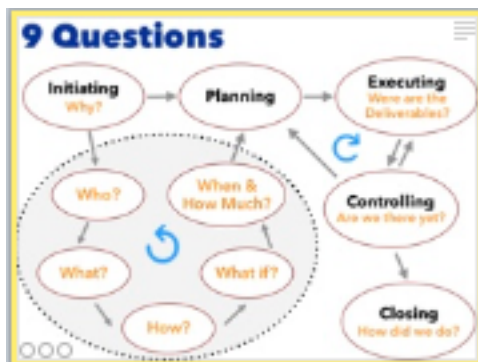
Slide 5

Introduce the 9 steps and its relations to the project as they appear. Give a brief summary of the steps that will be cover in this workshop. *Say:* The project charter sets out the purpose of the project, why it's wanted and exactly what the project will achieve. Once that's established, you will have to identify stakeholders. The stakeholders are those with any interest and or influence in the project outcome. Their needs are transform into formal set of requirements that must be taking into account to achieve the project outcome.
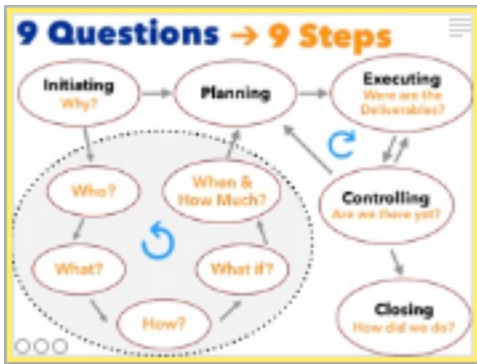
Slide 6

Say: Look at the 9 questions being ask on this slide. Each of the 9 questions prompt you to consider an action or decision when managing projects.

Slide 7

Say: The 9 Questions are related to the 9 Steps in project management. Answering each of the 9 questions helps you move through the process of managing projects. Explain to participants that the **initiating and planning stages** are ongoing and can be altered at anytime to achieve the project outcome. Once you reach the **executing and controlling** steps, you can also go back and forth to make sure the project deliverables aligned with the project charter.

Part 2) Introduction to Case Study #1
Suggested time: 10 minutes

The case study in this section will help participants get the feel for the complexities of managing projects and how they can use the 9 steps to diagnosed potential problems, while considering a variety of solutions.

Slide 8

Say: Handout the case study narrative handout to participants and ask students to read them.

?Ask: participants what do you think the project goal is? Who is paying/sponsoring the project? How and when will the payee/sponsor get the investment back if they contribute to the project?

Slide 9

Say: Discuss the project with participant, by having them summarize the objectives and goals of the project.

[Group Set-Up/Logistics for the Workshop]

Instruct participants that before we get started with the rest of the project management training steps, they will be split into teams. *Try to have teams of four participants to encourage everyone to participate.* Count off each participant from one through whatever number will get you to teams of four. Have them come up with a team name*.*

Once participants are in their teams, let them know that this will be a competition amongst teams and that you (as the facilitators) will be keeping score on what one groups suggests that is agreed upon by the entire group.
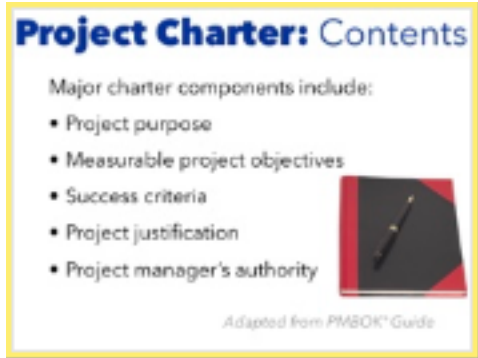
Slide 10

Say: Let's begin with step 1 of 9, initiating the project the charter. The project charter gives those managing projects the mandate to carryout the work purpose of the project.
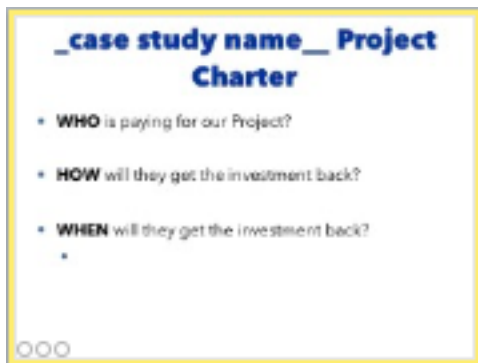
Slide 11
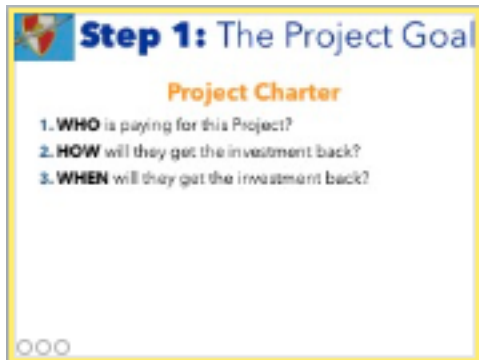
Say: In the project charter you will have the project objectives and goals, which explains why the project is wanted for investment by stakeholders.

Slide 12

Project Charter: Contents

Major charter components include:

- Project purpose
- Measurable project objectives
- Success criteria
- Project justification
- Project manager's authority

Adapted from PMBOK® Guide

Say: These are major components that should be included in the project charter. Read the list on the slide. Consider these component when you come up with your answer as a team for the case study project charter.

Slide 13

_case study name__ Project Charter

- **WHO** is paying for our Project?
- **HOW** will they get the investment back?
- **WHEN** will they get the investment back?
  -

○○○

?Ask: Who is paying/sponsoring the project? How and when will the payee/sponsor get the investment/desire outcome for their contribution to the project?
Say: Let's discuss your responses to the questions.

Get each team to quickly share their answers and have a group discussion, and decide on the project charter so everyone can understanding the case study project goal and their own capacity to carry it out. *Take score of any teams who's ideas end up agreed on.*

Part 3) Step 2 — Stakeholder Analysis
Suggested time: 10 minutes

The stakeholder analysis activity prompt participants to consider stakeholders who interests are paramount to meeting the project's objectives. During this activity participants will identified stakeholders who will be directly affected by, or who could directly affect the stated project's objectives.

Slide 14

Say: the next step after initiating the project charter is identifying who the stakeholders are, pertaining to the project goal and outcome.

Slide 15

Say: A stakeholder is anyone who would have an impact, interest, and or influence on the outcome of the project. Stakeholders roles may vary throughout the 9 steps process of managing projects. It's imperative to consider all stages of the project when identifying the project stakeholders.
Read the bullet points on the slide including the quote in blue at the bottom of right of the slide.

Slide 16
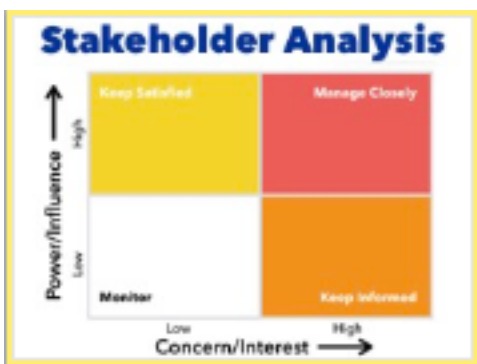
Say: As you make a list of all stakeholders for this project, consider the power/influence each stakeholder will have from low to high. power/influence You should rate the stakeholders concern/interest level from low to high too. The goal is to get at least four stakeholders in the four quadrant, in order for you all to prioritized and transformed how you can best manage the project and stakeholders desirable outcome.

Slide 17

Say: identify who the stakeholders are for this project and jot them down on the sticky notes. Each sticky note should have <u>one stakeholder</u> on it. Place your sticky notes of stakeholders in one of the four quadrants.Let discuss why each group chose those stakeholders.
Have participants come to an agreement on who the stakeholders should be going forward. Then have participate discuss where they should be placed on the quadrant.

Part 4) Step 3 — Stakeholder Requirements
Suggested time: 10 minutes

The stakeholder requirements activity draws out the interests of stakeholders in relation to meeting the project's objectives. This process involves identifying stakeholders' needs with the stated intent of meeting the project's objectives. The activity in this session will help participants collectively considered requirements needed to achieve the project objectives.

Slide 18

Say: Step 3 of 9 is to analyze the needs and requirements of stakeholders.

Slide 19

Say: Stakeholder needs are transformed into a formal set of stakeholder requirements, which are desires and expectations each stakeholder may have pertaining to the project. For each stakeholder, what are the: expectation, desires, hopes, need … related to the project goal.

Slide 20
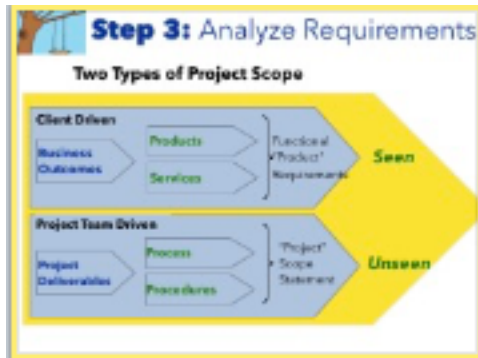
Say: There are two type of project scope. There's one driven by the client/stakeholder, which are tangible outcomes that can be measurable through results or specific items that can be produced to. Then, there's project team scope, which are intangible deliverables. The procedure the team must take to produce the project.

Slide 21
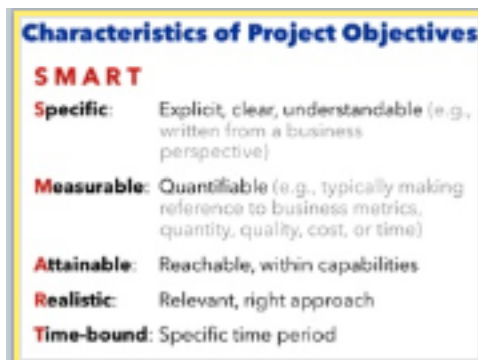
Say: When you are analyzing stakeholder requirements and the level of difficulty for each requirement you should think about the SMART acronym. As it will help you understand whether the requirement is high or low in difficulty.
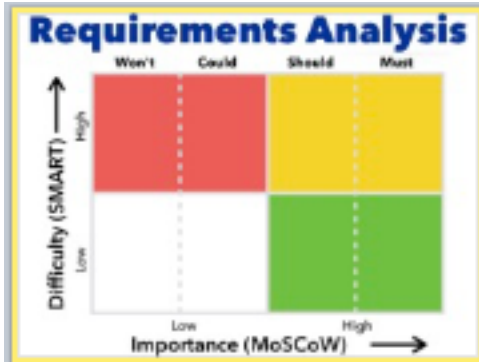Go over the definition of each letter in the acronym.

Slide 22

?Ask: What are our stakeholder requirements for this project.
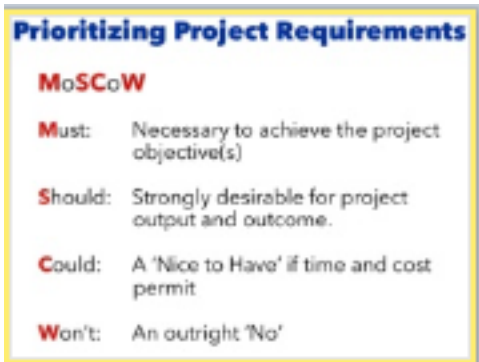Tell each team to write down stakeholder requirements that will satisfy the objectives of the project.

Each stakeholder's requirement should be written on the color sticky note.

Slide 23

Say: Now that you have created your list of requirement, think about where you will place them on the grid.
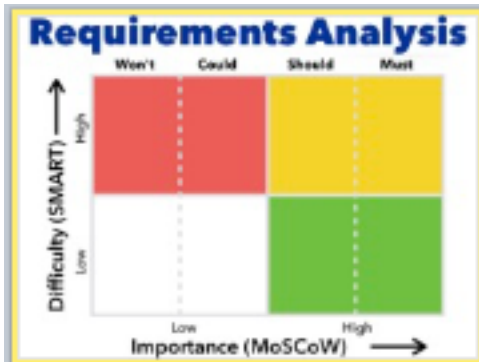
Slide 24

Say: You have to know as a team the importance of each stakeholder requirement to the project. The acronym MoSCoW will help you prioritize whether the requirement is low or high in importance to the project objectives.

Go over the definition of each letter in the acronym.

Slide 25

Say: Now that you know can rank your stakeholder requirements from high-to-low in terms of difficulty as well as from high-to-low in terms of importance to the project objectives. Place your requirements on the grid and we will go around the room to discuss why you placed them there.
Encourage teams to defend their decision as to why they chose to placed a requirement in a certain spot on the poster grid.

Part 5) Reflection Discussion
Suggested time: minutes

If time permits, ask students to reflect on the usefulness of these first three steps in relation to projects they have worked on, are working on, or are planning to work on.

Wrap Up:
Put sticky notes onto notebook paper for each grid for use in follow-up sessions.
Let students know you all will be covering Steps 4-5-6 in next session.

Credits:
This workshop was adopted from Frank Ryle, *Project Management for Pros: Keeping Score, A 9 Step Approach to Managing Any Project.* This workshop was developed by Bobby Hackett and Arthur Tartee, Bonner Foundation staff, as part of the Managing Projects series for the Bonner Curriculum. References and sources of materials used including.

See also:

Abudi, G. (Ed.). (2018, October 9). The Five Stages of Project Team Development. Retrieved from https://project-management.com/the-five-stages-of-project-team-development/

Martin, M. (2016, September 13). How to plan, execute and monitor a project effectively. Retrieved from https://www.cleverism.com/plan-execute-monitor-project-effectively/

Monnappa, A. (2018, September 12). Project Scope Management: What It is and Why It's Important. Retrieved January 5, 2019, from https://www.simplilearn.com/project-scope-management-importance-rar89-article
Norris, C., Perry, J., & Simon, P. (2000, January). Https://www.fep.up.pt/disciplinas/pgi914/ref_topico3/projectram_apm.pdf. Retrieved December 20, 2018, from https://www.fep.up.pt/disciplinas/pgi914/ref_topico3/projectram_apm.pdf

Priestley, D. (2015, August 11). Forming, Storming, Norming and Performing: The Stages of Team Formation. Retrieved January 8, 2019, from http://www.ventureteambuilding.co.uk/forming-storming-norming-performing/

Verma, V. K. (2008). *Managing the project team*. Brantford, Ont.: W. Ross MacDonald School Resource Services Library.