

# Project Management Workshop Takeaway

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## **Project Management**

This document was prepared as part of the regional workshop on Leadership – Module 2, held in Jamaica, July 2-5, 2019, as part of the Project for the Regional Advancement of Statistics in the Caribbean (PRASC). More details can be obtained by referring to the presentation slides on [Dropbox](#). Any questions or assistance request can be directed to the PRASC email: [statcan.prasc-prasc.statcan@canada.ca](mailto:statcan.prasc-prasc.statcan@canada.ca).

The management of projects is key to providing value for money and demonstrating sound stewardship in program delivery. A comprehensive approach to managing projects will enhance the likelihood of realizing project outcomes.

### ***A Project is:***

- *An activity or series of activities that has a beginning and an end.*
- *Required to produce defined outputs and realize specific outcomes, within a clear schedule and resource plan.*
- *Undertaken within specific time, cost and performance parameters.*

A comprehensive approach to managing projects, which is appropriate for the level of project risk and complexity, will enhance the likelihood of realizing project outcomes.

This approach should ensure that accountability for outcomes is clear, appropriate controls are in place to minimize risk and limit project duplication and overlap, key project stakeholders are consulted, and outputs and outcomes are monitored and reported.

### ***Project Management is:***

- *The systematic planning, organizing and control of allocated resources to accomplish identified project objectives and outcomes.*

## A more formalized approach to project management will help to:

- Provide justification for new business proposals
- Scope your requirements
- Develop a business case to evaluate options
- Develop project plans that cover all areas: scope, schedule, cost, quality assurance, human resources management, procurement, training, communications and technical
- Monitor and control your projects through all stages by comparing to baseline plans, giving you the means to react quickly when your project is not on course
- Use resources more effectively
- Meet deadlines
- Communicate more clearly and effectively
- Organize the work
- Use a change-management process for handling change requests
- Be more effective
- Complete the project on time and on budget
- Increase the likelihood of obtaining the intended results
- Measure your results more easily
- Provide a close-out report with lessons learned
- Provide final documentation that can be kept as corporate history and learning for continuous improvement.

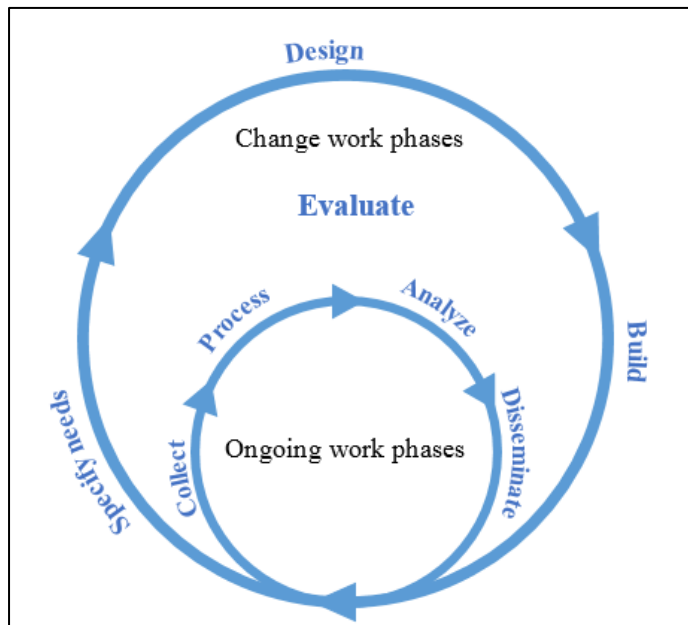
### *A good Project Management methodology needs to:*

- *Provide a common and explicit vocabulary, common concepts*
- *Define clearly the structure and the roles and responsibilities*
- *Promote effective communication*
- ***Be flexible***

## Generic Statistical Business Process Model<sup>1</sup>

Several Project Management methodologies, processes or frameworks have been developed over the years. They all propose generally accepted knowledge and principles in project management, using slightly different terminology and grouping the various activities in a slightly different way. Emphasis on different activities also varies. A good project management framework in the context of National Statistics Organizations has been developed by the United Nations Economic Commission for Europe (UNECE) and is called the Generic Statistical Business Process Model (GSBPM). It provides a standard framework and harmonised terminology to help statistical organisations to modernise their statistical production processes.

- The GSBPM is not a rigid framework in which all steps must be followed in a strict order, instead it identifies the possible steps in the statistical business process, and the inter-dependencies between them.
- It should be applied and interpreted flexibly.
- The presentation of the GSBPM follows the logical sequence of steps in most statistical business processes, but the elements of the model may occur in different orders in different circumstances.
- Some sub processes can be revisited a number of times forming iterative loops, particularly within the Process and Analyse phases.
- GSBPM should therefore be seen more as a matrix, through which there are many possible paths
- GSBPM encourages a standard view of the statistical business process, without becoming either too restrictive or too abstract and theoretical.
- The GSBPM can be viewed as a checklist to make sure that all necessary steps have been considered or as a "cookbook" to identify all the "ingredients" of a statistical business process.



<sup>1</sup> Source: *Generic Statistical Business Process Model (GSBPM v5.1)*, United Nations Economic Commission for Europe (UNECE)

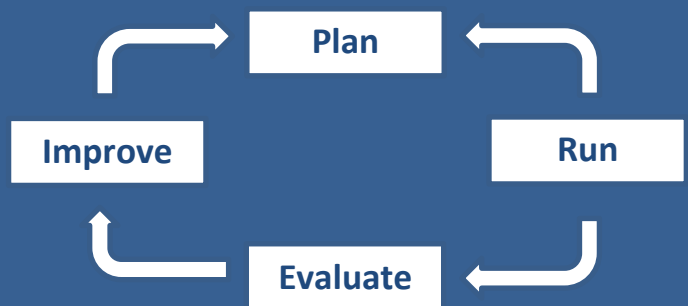
## The Model

### Generic Statistical Business Process Model - Version 5.1

Overarching Processes							
Specify needs	Design	Build	Collect	Process	Analyze	Disseminate	Evaluate
1.1 Identify needs	2.1 Design outputs	3.1 Reuse or build coll. instruments	4.1 Create frame and select sample	5.1 Integrate data	6.1 Prepare draft outputs	7.1 Update output systems	8.1 Gather evaluation inputs
1.2 Consult and confirm needs	2.2 Design variable descriptions	3.2 Reuse or build processing and analysis components	4.2 Set up collection	5.2 Classify and code	6.2 Validate outputs	7.2 Produce diss. products	8.2 Conduct evaluation
1.3 Establish output objectives	2.3 Design collection	3.3 Reuse or build diss. components	4.3 Run collection	5.3 Review and validate	6.3 Interpret and explain outputs	7.3 Manage release of diss. products	8.3 Agree an action plan
1.4 Identify concepts	2.4 Design frame and sample	3.4 Configure workflows	4.4 Finalize collection	5.4 Edit and impute	6.4 Apply disclosure control	7.4 Promote diss. products	
1.5 Check data availability	2.5 Design processing and analysis	3.5 Test production systems		5.5 Derive new variables and units	6.5 Finalize outputs	7.5 Manage user support	
1.6 Prepare and submit business	2.6 Design prod systems and workflow	3.6 Test statistical business process		5.6 Calculate weights			
		3.7 Finalise production		5.7 Calculate aggregates			
				5.8 Finalize data files			

*Keep in mind...*

*The GSBPM is not a rigid framework. It should be applied and interpreted flexibly. Some sub processes can be revisited a number of times forming iterative loops*



## Project Manager and Project Team

A governance and oversight mechanism must be in place to manage the initiation, execution, control and closing of projects. At a minimum, the project team includes a project steering committee, a project manager, and functional leaders. The roles may vary by project; however, the team should cover all responsibilities

### Project Manager:

A good project manager must have the ability to lead in order to meet objectives, delegate, have a vision, set an example, anticipate risks and help the team carry out its tasks. Project managers must build team spirit in order to motivate people, and ensure a productive environment. The ability to communicate in order to be able to persuade and listen is also key.

Project managers are also responsible or organize the project in order to be able to plan, analyze and verify the availability of resources and follow up in order to ensure that the project is carried out as planned;

Finally, project managers are responsible to manage conflict by resolving it and minimizing its impact.

### Project Team:

The project team is made up of all the people participating in the project, including the project manager. The composition of the project team depends on the nature of the project, the expertise required and the scope of the project. The role of team members is to do the work in accordance with the project plan.

Team members must:

- know what action they are to take and when;
- regularly consult the schedule in order to complete their tasks on time;
- keep the project manager informed of their progress;
- let the project manager know about any delays or problems as soon as possible.
- Team members contribute to the successful management of the project by managing their tasks properly.

#### ***Role of the Project Manager:***

- |                                    |                                 |
|------------------------------------|---------------------------------|
| - <i>Communication management</i>  | - <i>Procurement management</i> |
| - <i>Cost management</i>           | - <i>Risk management</i>        |
| - <i>Human resource management</i> | - <i>Scope management</i>       |
| - <i>Integration management</i>    | - <i>Stakeholder management</i> |
| - <i>Quality management</i>        | - <i>Time management</i>        |

# From Theory to Practice: Tools to Help Managing Projects

## 1 Project Charter

The project charter can most succinctly be described as the agreement between the organization providing the product or service and the customer organization requesting and receiving the project deliverable. It is a tool to obtain commitment from all affected groups and individuals within a specific project. A project charter defines: the partners and external stakeholders, the project management framework to be used on the project, the roles, responsibilities accountabilities, and activities of the team members and the management commitments.



Project Charter  
Template.docx



Project Charter  
Guide.docx

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## 2 Project Plan

The project plan is the controlling document to manage a project. The project plan describes the: interim and final deliverables the project will deliver, managerial and technical processes necessary to develop the project deliverables, resources required to deliver the project deliverables and additional plans required to support the project.



Project Plan  
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Project Plan  
Guide.docx

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### 2.1 Work Breakdown Structure

A Work Breakdown Structure (WBS) is a tool used to define and group a project's discrete work elements (or tasks) in a way that helps organize and define the total work scope of the project. In order to develop your WBS, the first step is to identify your project milestones, and then each activity that falls into every milestone. You want the name of your project to be the first line to appear in your list. Under it, you will put your first milestone, which is going to be the first subtask of your project. Then, under this milestone, you will write every activity that falls under it so that they become subtasks of your milestone. This way, you will have:

1. Project name
  - 1.1 First milestone
    - 1.1.1 First task
    - 1.1.2 Second task
  - 1.2 Second milestone



Work Breakdown  
Structure.xlsx

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## 2.2 High Level Schedule – Tier Plan

Maintaining a High level (“Tier” plan) schedule is a good way to keep track of the key dates, the deliverables and the dependencies between project components and project team members. The Tier schedule is kept up to date, agreed with all stakeholders and changes to the schedule are managed using a change request process.

Unique identifier			Description	Type	Owner	Receiver for deliverables	Plan, forecast and actual dates						
Identification			Title	Type	Responsibility		Schedule						
Tier 0 #	Tier 1 #	Tier 2 #		Sub-Project Owner (= Census Sub-Project)	Task Owner (= Census Task, or Approved External Code (or Sub-Projects without Tasks, i.e. PM, CM, REQM, etc.))	Receiver (= Census Task, or Approved External Code (or Sub-Projects without Tasks, i.e. PM, CM, REQM, etc.))	Plan Start	Plan Finish	Forecast Start	Forecast Finish	Actual Start	Actual Finish	
1	0	0	Stage 1 Completed – Idea generation	Milestone	PM			3-Nov-17	3-Nov-17	3-Nov-17	3-Nov-17		
2	0	0	Stage 2 Completed – Project assessment	Milestone	PM			3-Nov-17	3-Nov-17	3-Nov-17	3-Nov-17		
3	0	0	Stage 3 Completed – Project initiation	Milestone	PM			2-Jun-18	2-Jun-18	2-Jun-18	2-Jun-18		
4	0	0	Stage 4 Completed – Project planning	Milestone	PM			1-Nov-19	1-Nov-19	1-Nov-19	1-Nov-19		
5	0	0	Stage 5 Completed – Project execution	Milestone	PM			26-Jan-23	26-Jan-23	26-Jan-23	26-Jan-23		
6	0	0	Stage 6 Completed – Project close-out	Milestone	PM			7-Mar-25	7-Mar-25	7-Mar-25	7-Mar-25		
1	1	1	Project Charter Signed with SSC	Milestone	SIA		CMO	14-Apr-17	14-Apr-17	14-Apr-17	14-Apr-17		


  
 High Level Schedule - Tier Plan. (right-click on icon and Open File)

## 2.3 Critical Path Summary

The Critical Path Summary is a reduced version of Tier Plan that focus on critical task and dependencies. Critical Path Summaries should be reviewed frequently by Project Managers.


  
 Critical Path Summary.xlsx (right-click on icon and Open File)

## 2.4 Executive Dashboards

An Executive Project Dashboard is a good way to document and report on the status/health of a project by means of key project metrics. It can be tailored to include key elements that are important to the senior management. The benefits of using Executive Project Dashboards include:

- communication of the project's health and status to project executives and stakeholders
- increased visibility of risk and issues that may impact the project's success, thus providing early opportunities for course correction;
- support for evidence-based governance decisions and executive accountability.

## 2.5 Change Management

Change is expected! The goal of the change management process is to minimize the potential negative impact of changes on the project outcomes.

- **Change management** is a formal process whereby the proper authority controls and approves changes to the baselines (scope, schedule or cost) and any such changes are communicated appropriately.
- **Change request** is a formal proposal to modify any document, deliverable or baseline.
- **Change log** is a comprehensive list of the changes made during the project. This typically includes the date for each change and the impacts in terms of time, cost and risk. The list includes:
  - Description, justification, impact assessment, due date, stakeholders, estimated cost and effort, and decision statement

### *Scope changes:*

- *May impact the project budget and schedule.*
- *May require revisions to detailed requirements, the project scope statement, and other project documentation as necessary.*

### *Schedule changes:*

- *May require fast-tracking, crashing or re-baselining the schedule*

### *Cost changes:*

- *May require requesting additional funding, releasing funding no longer required, or adding to project or management reserves.*



Change Log.xlsx

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### 3 Risk Management

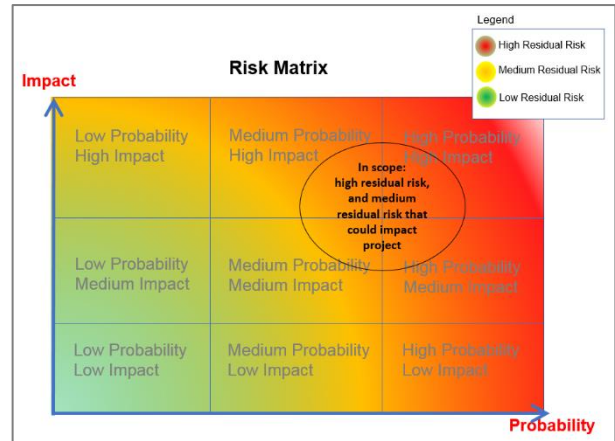
Risk is the likelihood and impact of an event that has the potential to prevent the organization from achieving its objectives (deliverable, schedule or budget)

Managing risk is a key activity for project managers, in order to develop effective mitigation and contingency strategies that reduce: i) the probability of risks materializing, and/or ii) the impacts if risks do materialize.

Risk Management Tool Category Guidelines			
	High	Medium	Low
Probability	Very likely to occur	Significant potential to occur	Unlikely to occur
Impact	Affects project outcomes	Affects sub-project outcomes only	Minor effect
Residual Risk	Highly likely to affect project outcomes	Significant potential to affect project or sub-project outcomes	Unlikely to affect any outcomes, or likely to have a minor effect on sub-project outcomes only
	Escalate to project level.	Escalate to project level if project outcomes could be affected.	

Risk management strategies can include:

- Transferring risk to another party
- Avoiding risk
- Reducing the negative impact of risk
- Accepting some or all of the consequences of a particular risk



Likelihood	Impacts				
	Low	Medium-Low	Medium	Medium-High	High
<b>High (Almost certain)</b>	Assign oversight/management responsibilities	Need senior management attention	Need senior management attention	Detailed management planning and attention is required	To be managed by senior management with a detailed plan
<b>Medium-High (Likely)</b>	Assign oversight/management responsibilities	Assign oversight/management responsibilities	Need senior management attention	Need senior management attention	Detailed management planning and attention is required
<b>Medium (Possible)</b>	Manage by routine procedures	Assign oversight/management responsibilities	Assign oversight/management responsibilities	Need senior management attention	Detailed management planning and attention is required
<b>Medium-Low (Unlikely)</b>	Manage by routine procedures	Manage by routine procedures	Assign oversight/management responsibilities	Assign oversight/management responsibilities	Assign oversight/management responsibilities
<b>Low (Rare)</b>	Manage by routine procedures	Manage by routine procedures	Manage by routine procedures	Assign oversight/management responsibilities	Assign oversight/management responsibilities

The risk management is a key element included in both the project charter and the project plan. It is also possible to manage the risk using a separate document in order to include more details.



Risk Review.xlsx

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