

# Project Management as an Excellence Practice

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# The Promise Of Community Action

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*Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community and we are dedicated to helping people help themselves and each other.*



1000+ Community Action Agencies  
leading change across America

# Land Acknowledgement

*Every community owes its existence and vitality to generations from around the world who contributed their hopes, dreams, and energy to making the history that led to this moment. Some were brought here against their will, some were drawn to leave their distant homes in hope of a better life, and some have lived on this land for more generations than can be counted.*

- Go to <https://native-land.ca/> and enter your address in the search box on the left of the screen
- **Offer your land acknowledgement in the chat**
  - “This meeting is being held on the traditional lands of the \_\_\_\_\_ People, and I pay my respect to elders both past and present, who have stewarded this land throughout the generations.”

# Agenda



Projects, Project Management, and their link to Excellence



Project Management Practices



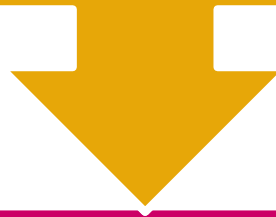
Tools to Help You Get Started



Q & A

# First things first: What is a Project?

According to the [Project Management Institute](#),  
*“projects are temporary efforts to create value  
through unique products, services, and processes.”*



Further, *“projects are amalgamations of tasks,  
activities, and deliverables that must be structured  
and executed carefully to achieve a desired outcome.”*

# Examples of Projects in Community Action



Writing a  
Grant  
Proposal



Migration to  
a New  
Database



Implementing  
a New HR  
System



Developing a  
Board  
Orientation



Overhaul of  
the Customer  
Intake  
Process



Developing a  
New Program

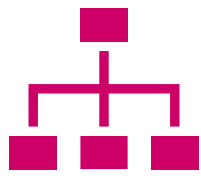
Ok, so what is

# Project Management?

*The use of specific  
knowledge, skills, tools and  
techniques to  
deliver something of value  
to people*

(Project Management Institute)

# Project Management can be an Excellence Practice



Project Management allows for a formal and systematic approach to projects, aligning the processes to support agency objectives across the organization



Project Management brings consistent and proven approaches, principles, and practices to all agency projects

# Excellence in Community Action

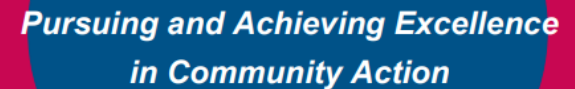
- Developed by experienced Community Action practitioners to capture “best-in-class practices”
- Represent real-world practice in use by CAAs
- Frequently updated to reflect evolving and emerging practices in the field



PATHWAYS  
to  
EXCELLENCE



2021 STANDARDS OF EXCELLENCE<sup>®</sup>



*Pursuing and Achieving Excellence  
in Community Action*



<https://communityactionpartnership.com/wp-content/uploads/2022/01/2021-Standards-of-Excellence-with-Pathways-Branding-Rev-Dec-21-Final.pdf>



# Community Action Excellence Standard

## 6.6: Project Management

A formal, agency-wide project management policy and process is in place incorporating eight core elements. Under the policy, the agency systematically manages all projects and initiatives in a coherent manner to ensure close integration/linkage with agency goals/strategies and program specific activities.

# Community Action Excellence Standard

## 6.6: Project Management

The policy addresses the following eight core elements:

- 1.) Project performance is systematically managed to meet/exceed project goals and objectives.
- 2.) All projects include measurable (ROMA) projected outcomes and objectives linked to broader agency strategies.
- 3.) Project staff regularly reviews and improves projects based on customer feedback.
- 4.) Project implementation/progress is systematically assessed, tracked, and reported to agency leadership.
- 5.) Project budgets are systematically monitored and not exceeded.
- 6.) Project staff attends appropriate and necessary training.
- 7.) Project related facilities meet or exceed ADA and building codes.
- 8.) A final status report is produced assessing a project's success and contribution to overall agency goals/strategies.

# Managing Projects to Meet Objectives and Goals

Creating an agency-wide procedure and associated tools can help everyone in your organization understand the objectives and goals of each project and manage projects cohesively.



# Policy & Procedure Development

- Consider:
  - Where are there projects (and potential projects) in our organization?
  - What is needed to ensure all projects, regardless of where they reside in the organization, have what they need to be successful?
  - What does leadership need?
  - What do project managers and staff need?
  - What training will we make available?

# Getting Started: Define the Project

What, exactly, is the project?

- Gain consensus on what the project is seeking to achieve and what its deliverables are.

What is the timeline?

What is the budget?

# Going Deeper...

## Defining Requirements

- Wants vs needs

## Identifying Stakeholders

## Identifying Risks

# Getting Started: The Project Charter



The Project Charter is a short document that is completed at the outset of the project to define the project scope, including the business case for the project (need), high-level goals/objectives, requirements, timeline/milestones, budget, stakeholders, and risks.



It ensures project staff and sponsors have agreement on these key elements.

# Project Charter Examples

1. General Project Information				
Project Name:				
Executive Sponsors:				
Department Sponsor:				
Impact of project:				
2. Project Team				
	Name	Department	Telephone	E-mail
Project Manager:				
Team Members:				
3. Stakeholders (e.g., those with a significant interest in or who will be significantly affected by this project)				
4. Project Scope Statement				
<b>Project Purpose / Business Justification</b> Describe the business need this project addresses				
<b>Objectives (in business terms)</b> Describe the measurable outcomes of the project, e.g., reduce cost by xxxx or increase quality to yyyy				
<b>Deliverables</b> List the high-level "products" to be created (e.g., improved xxxx process, employee manual on yyyy)				
<b>Scope</b> List what the project will and will not address (e.g., this project addresses units that report into the Office of Executive Vice President. Units that report into the Provost's Office are not included)				

## 1 INTRODUCTION

### 1.1 PURPOSE OF PROJECT CHARTER

*[Provide the purpose of the project charter.]*

The <Project Name> project charter documents and tracks the necessary information required by decision maker(s) to approve the project for funding. The project charter should include the needs, scope, justification, and resource commitment as well as the project's sponsor(s) decision to proceed or not to proceed with the project. It is created during the Initiating Phase of the project.

The intended audience of the <Project Name> project charter is the project sponsor and senior leadership.

## 2 PROJECT AND PRODUCT OVERVIEW

*[Typically, the description should answer who, what, when and where, in a concise manner. It should also state the estimated project duration (e.g., 18 months) and the estimated project budget (e.g., \$1.5M).]*

## 3 JUSTIFICATION

### 3.1 BUSINESS NEED

*[Example: A data collection system is necessary to conduct a national program of surveillance and research to monitor and characterize the x epidemic, including its determinants and the epidemiologic dynamics such as prevalence, incidence, and antiretroviral resistance, and to guide public health action at the federal, state and local levels. Data collection activities will assist with monitoring the incidence and prevalence of x infection, and x-related morbidity and mortality in the population, estimate incidence of x infection, identify changes in trends of x transmission, and identify populations at risk.]*

### 3.2 PUBLIC HEALTH AND BUSINESS IMPACT

*[Example: System x collects information about x infection as the jurisdictional, regional, and national levels and will assist in monitoring trends in x transmission rates, incidence rates and x morbidity and mortality trends to help determine public health impact.]*

### 3.3 STRATEGIC ALIGNMENT

Goal	Project Response Rank	Comments
Scale: H – High, M- Medium, L – Low, N/A – Not Applicable		
<b>NC / Division / Branch Strategic Goals:</b>		
combo		
<b>CDC Strategic Goals:</b>		
<Reference Appendix C for goals>		

[https://www.nyu.edu/content/dam/nyu/hr/documents/Project Charter Template.doc](https://www.nyu.edu/content/dam/nyu/hr/documents/Project_Charter_Template.doc)

[https://www2a.cdc.gov/cdcup/library/templates/CDC UP Project Charter Template.doc](https://www2a.cdc.gov/cdcup/library/templates/CDC_UP_Project_Charter_Template.doc)

# The Project Charter is More than a Form

The Project Charter is a tool to help you get clear on what the project is, its goals, and expectations.

The Project Charter memorializes the project definition and scope.

The Project Charter documents approval of project scope, resources, and timeline.

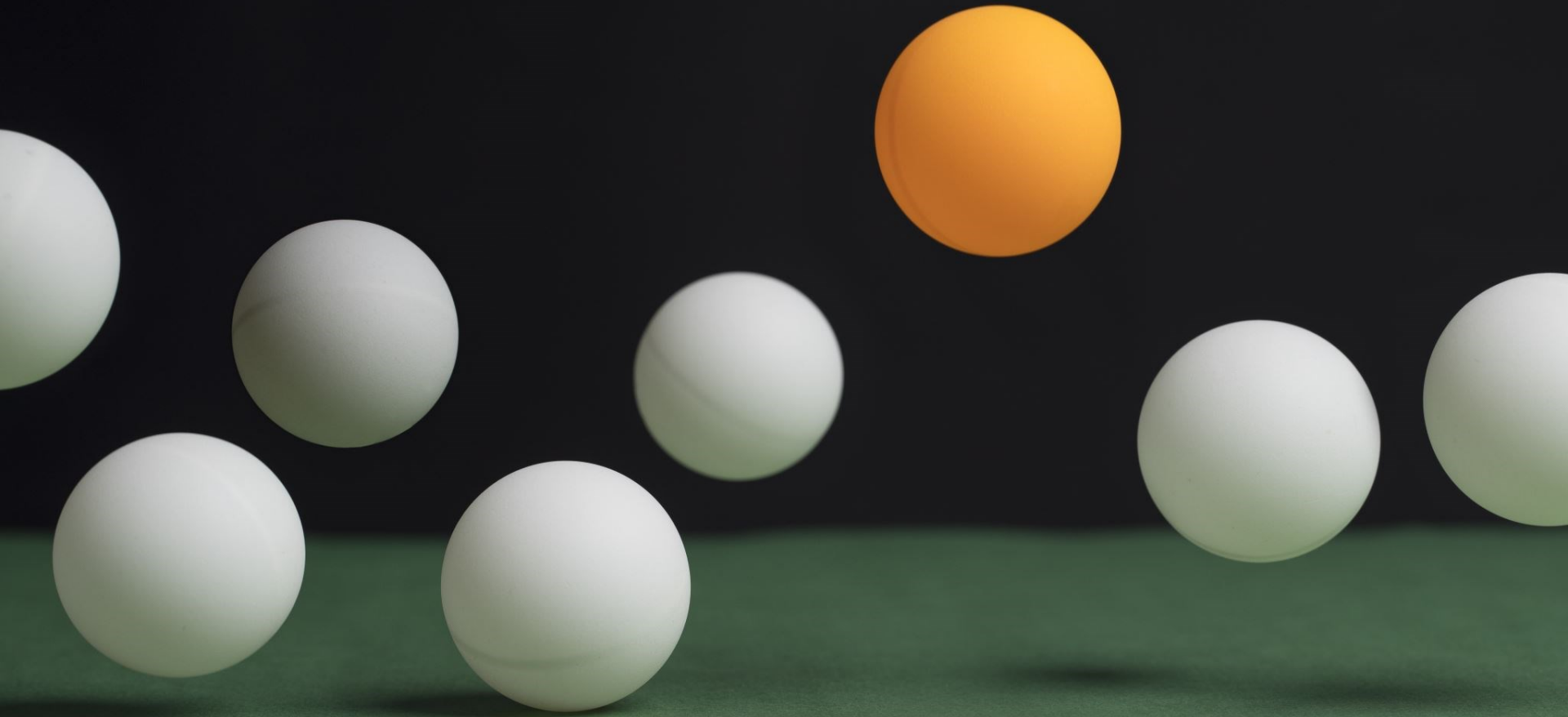
# Customize your Charter to your Organization

Review free templates with project staff and agency leadership to identify what you like and what you need.

Based on your research, customize a charter to fit your organization's needs.

- Ensure that your charter includes a section to link project outcomes to agency strategic objectives/goals to support fulfillment of the Standard of Excellence.

# Managing the Project



# Managing the Work: Project Management Tools

- There are lots of tools, both paid and free, that can help your staff to manage a project
  - Project Management Software:
    - Monday.com; Asana; Clickup; MesiterTask; Smartsheets; Basecamp; Microsoft Planner; Microsoft Projects; and an endless list more.
  - Project Communication tools:
    - Microsoft Teams; Slack; SharePoint; OneNote; Yammer
  - Project Collaboration Tools:
    - SharePoint; OneDrive; GSuite (Google products); DropBox

# A Few Points about Tools...

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You don't have to use complex products; some folks use excel on a shared drive better than a full project management software suite.

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**Software will not solve process or team challenges**

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Don't get too hung up on the "perfect" tool. They all have benefits and drawbacks.

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Do your research before committing.

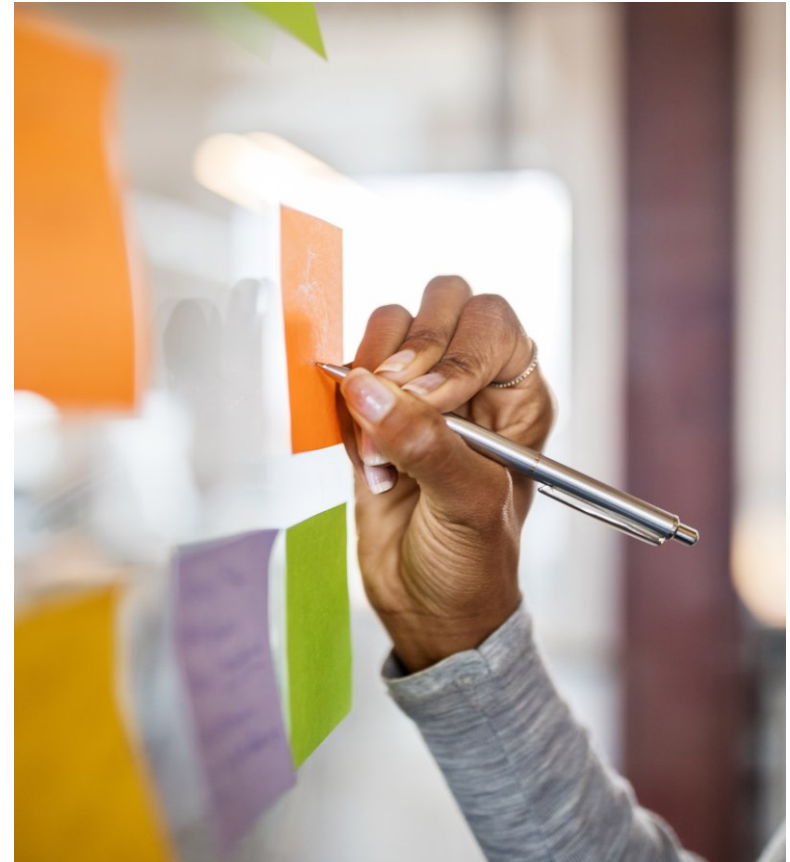
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# A big part of Project Management is about Stakeholder Engagement & Communication



# Project Meetings

- Create a standard approach to project meetings in your organization:
  - Required meetings
  - Agendas
  - Attendance expectations
- **AVOID:**
  - Meetings that should be emails/ reports
  - Meetings without agendas
  - Not inviting the people who need to be there/Inviting everyone in the organization



# Project Reports

Standardizing report templates will clarify expectations and enhance project oversight

## Consider:

- What information do we need to know if the project is being successful?
- Common items to track:
  - Summary of major accomplishments; upcoming work/action items
  - Timeline/Milestone Completion
  - Budget
  - Anything noteworthy to document for the project team or leadership – upcoming change requests, issues, risks, etc.

# Sample Project Report Templates

## Contents

### WEEKLY PROJECT STATUS REPORT TEMPLATE

Try Smartsheet for FREE

PROJECT NAME		PROJECT CODE	
PROJECT MANAGER		DATE OF STATUS ENTRY	
PERIOD COVERED		PROJECTED DATE OF COMPLETION	

#### PROJECT STATUS THIS WEEK

OVERALL PROJECT STATUS	ON TRACK	SUMMARY	Enter information here about overall status and highlights: "Regained lost time from last period." "QA began two days earlier than anticipated." "Deliv in some client feedback, but minimal."
MILESTONES			

#### PROJECT COMPONENTS

COMPONENT	STATUS	OWNER / TEAM	NOTES
BUDGET	UNDER		Call out highlights: "Exceptional work," "Solved problems, as well as issues, including establishing ownership of fixing trouble spots."
RESOURCES	POTENTIAL RISKS / DELAYS		New developments, new team members, etc.
TIMELINE	ROADBLOCK / OVERAGE		On track to final launch date
SCOPE	ON TRACK		

- I. Accomplishments..... 2
  - a. Completed This Reporting Period ..... 2
  - b. Planned but Not Completed This Reporting Period..... 2
  - c. Cause of Variance, if any ..... 3
  - d. Planned for Next Reporting Period ..... 3
- II. Scope ..... 3
  - a. Change Requests Made This Reporting Period ..... 3
- III. Schedule..... 3
  - a. Currently, Project is On, Behind or Ahead of Schedule (check one) ..... 3
  - b. Impact to Upcoming Milestones, Deliverable Due Dates or Project Due Dates ..... 4
  - c. Causes of Schedule Variance..... 4
  - d. Planned Corrective or Preventative Action ..... 4
- IV. Cost..... 4
  - a. Amount Spent ..... 4
  - b. Impact to Budget or Contingency Funds ..... 4
  - c. Planned Corrective or Preventative Action ..... 5
  - d. Costs Planned for Next Reporting Period ..... 5
- V. Earned Value..... 5
- VI. Risk ..... 6
- VII. Issues ..... 6

<https://www.smartsheet.com/content/project-report-templates>

<https://www.mypmlc.com/project-management-resources/free-project-management-templates/project-status-report-template/>



# Project Closing

- Project Closing is an important step:
  - Assure and agree work is completed
    - Review Charter – is everything in the Charter reflected in the final product?
  - Final Report (Excellence Requirement)
  - Document Lessons Learned
    - A lesson learned is knowledge we gained from the project.
    - Document these lessons consistently across the Organization
  - Archive Documents
    - Where do project documents formally live?

# Project Management Myths

- **MYTH:** Project Management is cumbersome and unnecessary
- **MYTH:** Standardized processes limit effectiveness
- **MYTH:** You need to use all aspects of formal Project Management to be effective
- **MYTH:** Process is everything



# Where can I learn more about Project Management?

- [Project Management Institute](#)
  - Professional Association for Project Management
  - Project Management Standards; Publications; Certifications & Training; Resources, tools and templates
- [ProjectManager.com](#)
  - Free videos, guides, templates, and articles
- [The Digital Project Manger](#)
  - Articles, tools, training, resources, community membership (note: some tools are behind a paywall)

# Ready to Pursue Excellence?

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**Now Enrolling for  
Bronze, Silver, and  
Gold Tiers!**



**Start Your Journey Today!**

<https://communityactionpartnership.com/pathways-to-excellence/>

Q & A ? !



# Thank You!

**The National Community Action Partnership is YOUR partnership and is always ready to support your organization in any way.**

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