



Project Management 101 Session I

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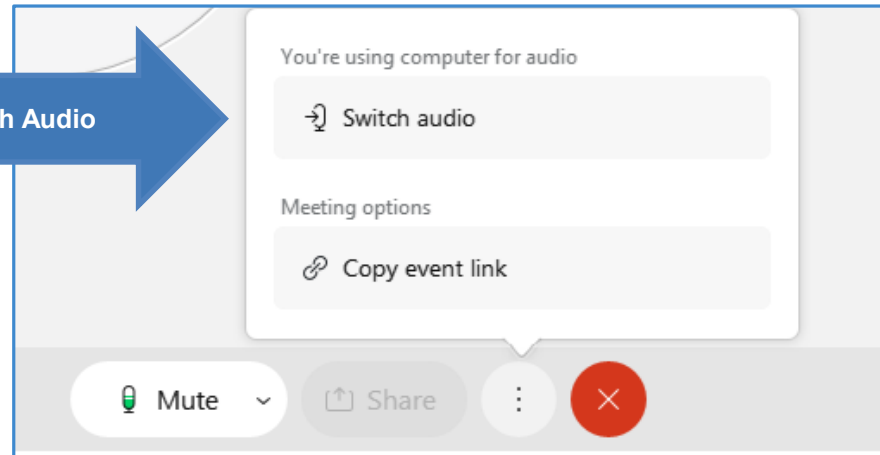
Andrea Harris
Project Coordinator II

Webinar Instructions

To avoid echoes and feedback, we request that you use the telephone audio instead of your computer audio for listening and speaking during the webinar.

Figure 1

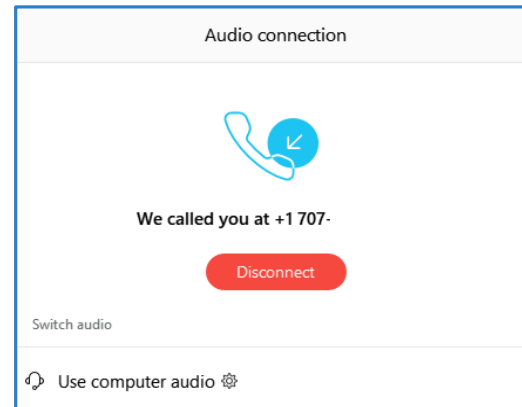
Click Switch Audio



You can switch your audio connection by clicking on the three dot ellipsis icon found at the bottom of your screen.

Figure 2

Enter telephone number

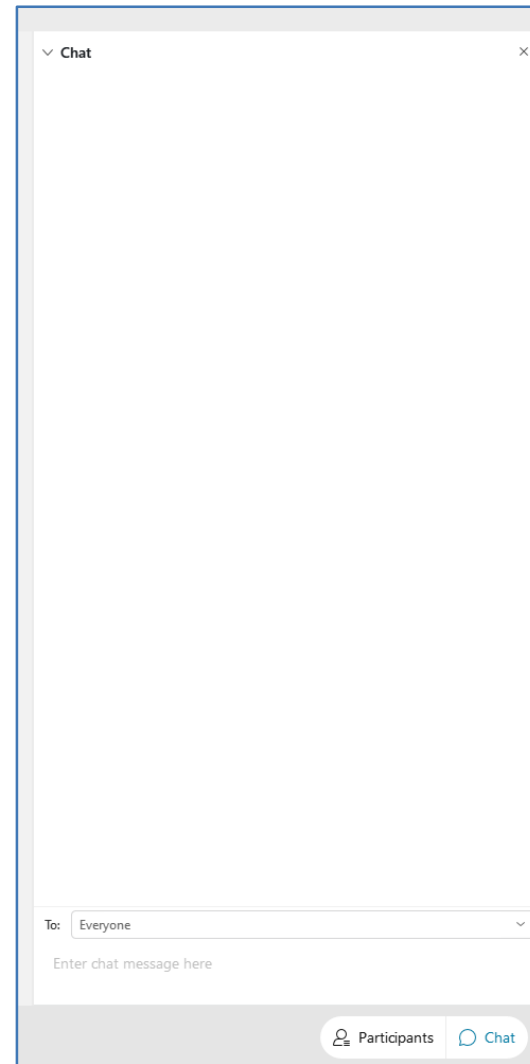


Webinar Instructions

- All attendees have been muted to eliminate any possible noise/interference/distraction.
- Please take a moment and open your chat box by clicking the chat icon found at the bottom right-hand corner of your screen and as shown in **Figure 1**.
- If you have any questions, please type your questions into the chat box, and they will be answered throughout the presentation.
- Be sure to select **“Everyone”** when sending a message.



Figure 1





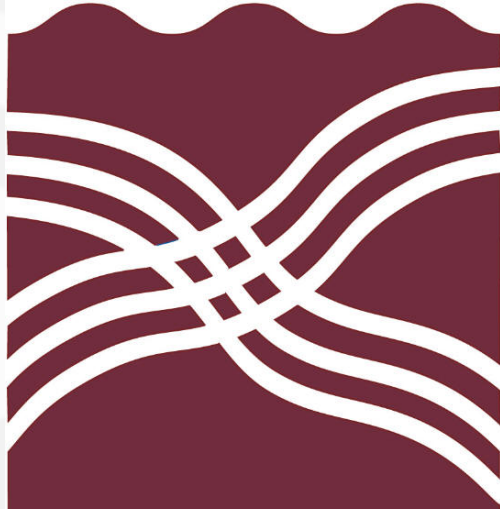
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PARTNERSHIP



HEALTHPLAN

of CALIFORNIA

Project Management Defined

Learning Objectives

1

**Introduction to
project
management
tools and
concepts**

2

**Gain an
understanding of
project
management
phases and
processes**

3

**Understand
steps in framing
and planning
projects**

What is a Project?

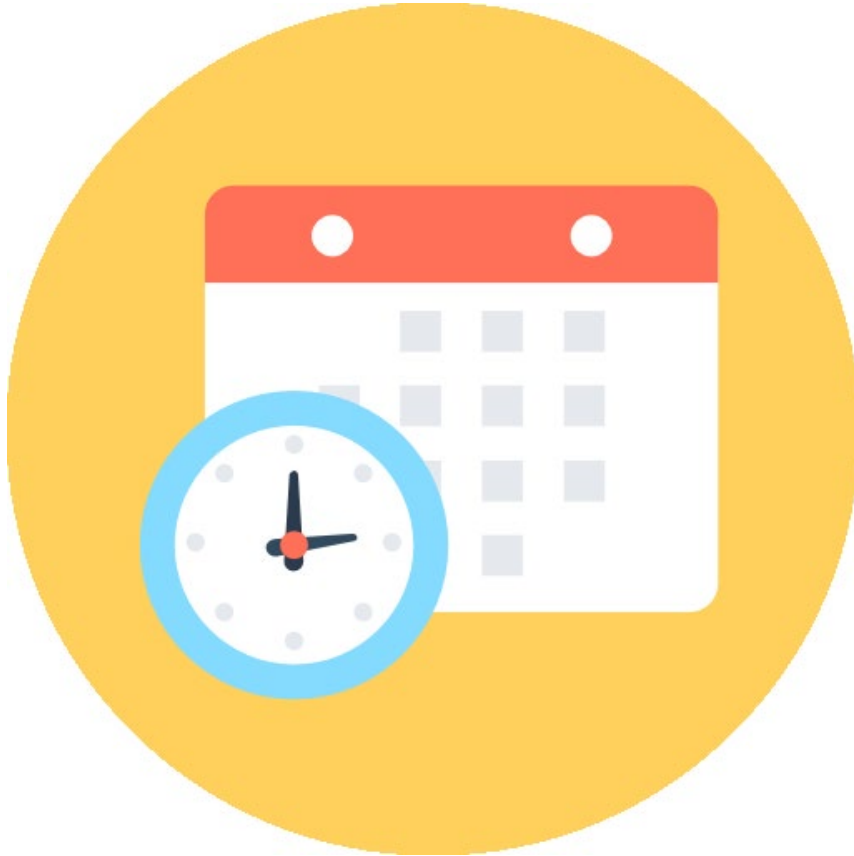


Project Defined

A temporary endeavor undertaken to create or improve a unique product, service, or result

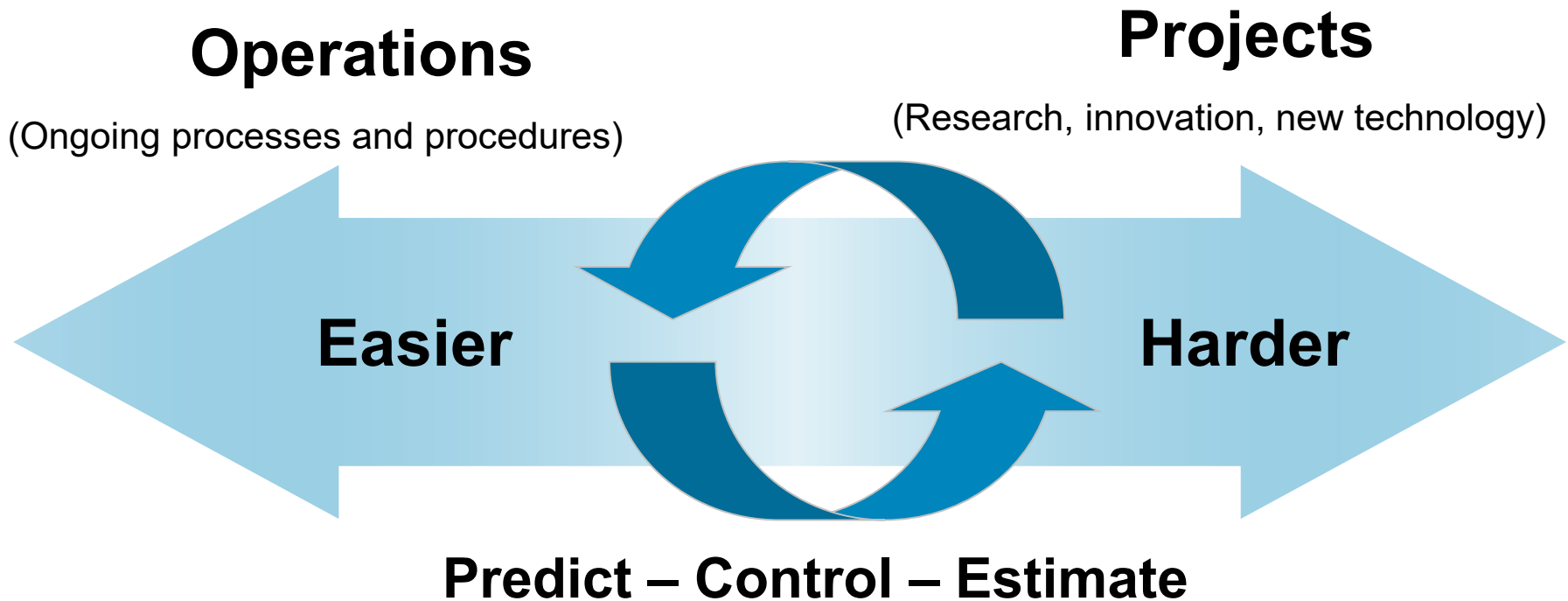


Characteristics of a Project



- Temporary
- Unique
- Requires a Team

The Operations/Projects Spectrum



Project Management's Role in Healthcare



- Structure and discipline
- Methodology and tools to:
 - Control costs
 - Reduce risk
 - Improve outcomes

<https://www.hsph.harvard.edu/ecpe/a-primer-on-project-management-for-health-care/>

How Does Project Management Work?

- **Distinct Roles/Responsibilities**

- Project Manager
- Project Sponsor
- Project Team
- Project Stakeholder(s)



<https://www.hsph.harvard.edu/ecpe/a-primer-on-project-management-for-health-care/>

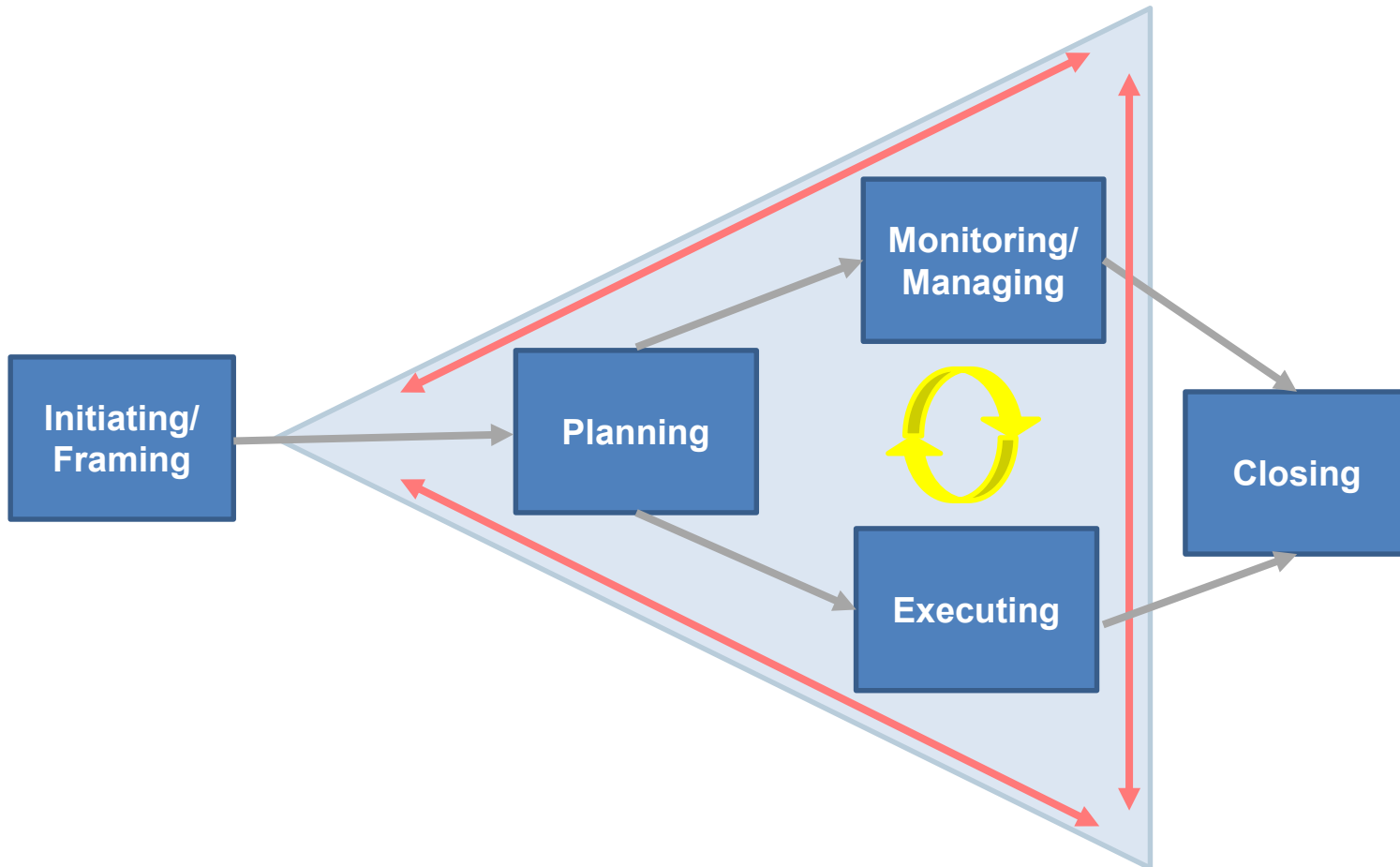
Project Management Processes

Initiating/
Framing

Planning

Executing/
Monitoring

Closing/
Transitioning



A Project Plan Should Answer ...

- What needs to be done?
- By when?
- How much will it cost?
- Who's going to do it?
- How will it be done?
- What do we need to do?

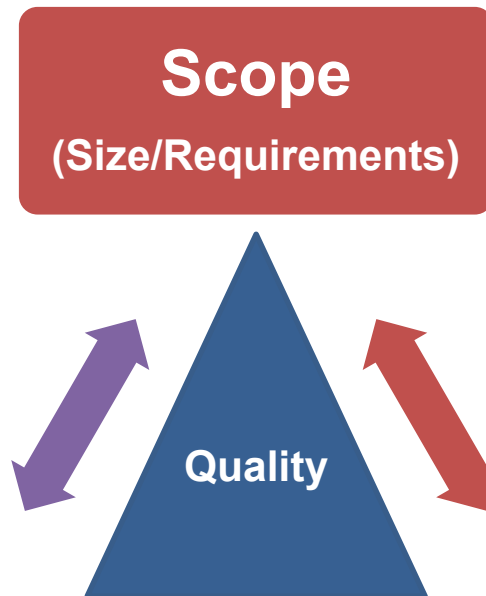


A Project Plan Must Address Constraints

The Triple Constraint

Evaluate Constraints:

- Whenever a major change is requested
- Whenever project assumptions change
- In conjunction with project risk assessments
- When setting quality and performance objectives



Use the Triple Constraint:

- To assess the impact of changes
- To negotiate changes to other constraints
- To make tradeoffs visible
- As a communication tool

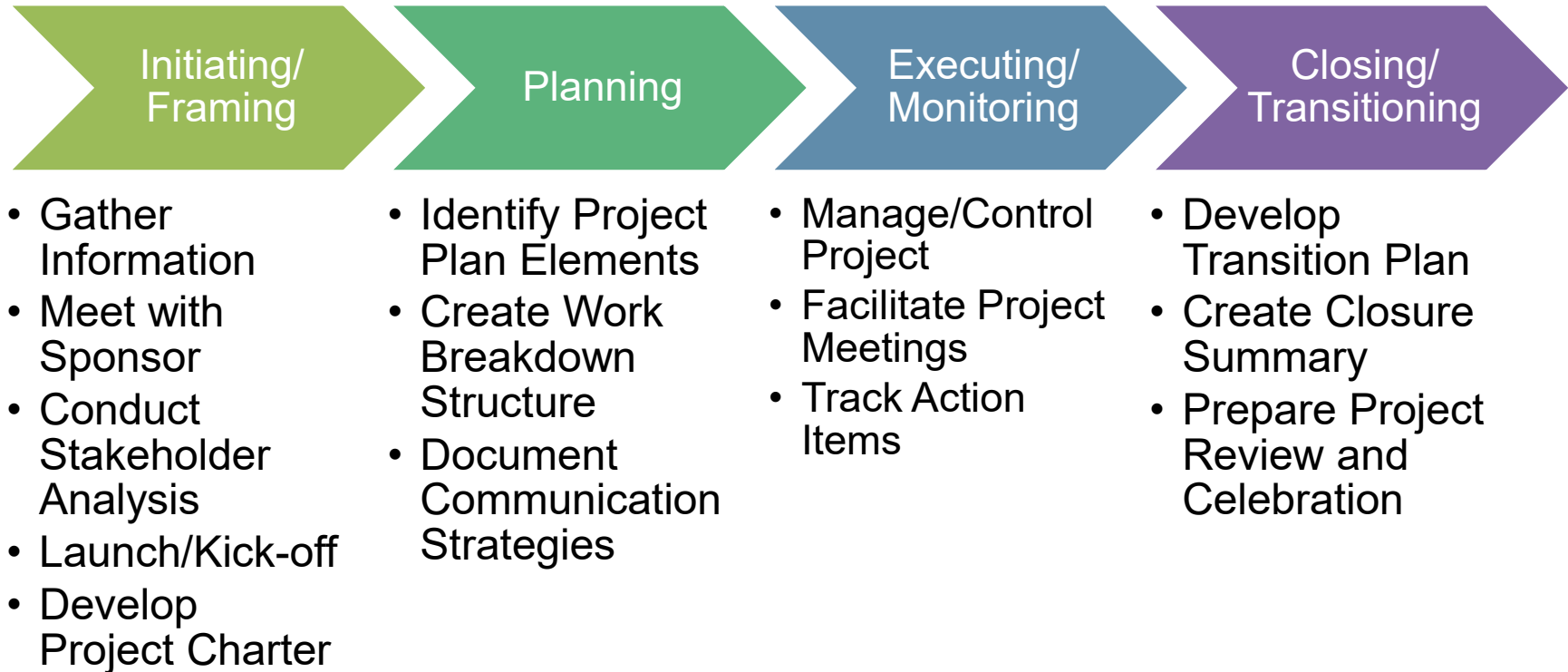
Key Components of Successful Projects

- Agreement on the goals
- Effective communication / engagement
- Controlled scope
- Leadership support
- Solid plan

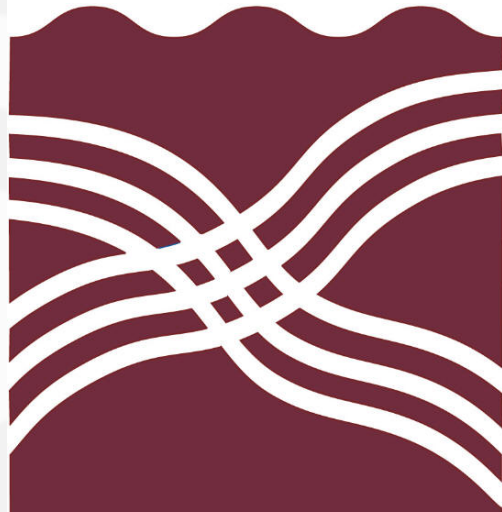




Our Framework for This Session



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Phase 1: Initiating/Framing

Initiating/Framing: Key Activities

Initiating/
Framing

Planning

Executing/
Monitoring

Closing/
Transitioning

Gather
Information

Meet with
Sponsor

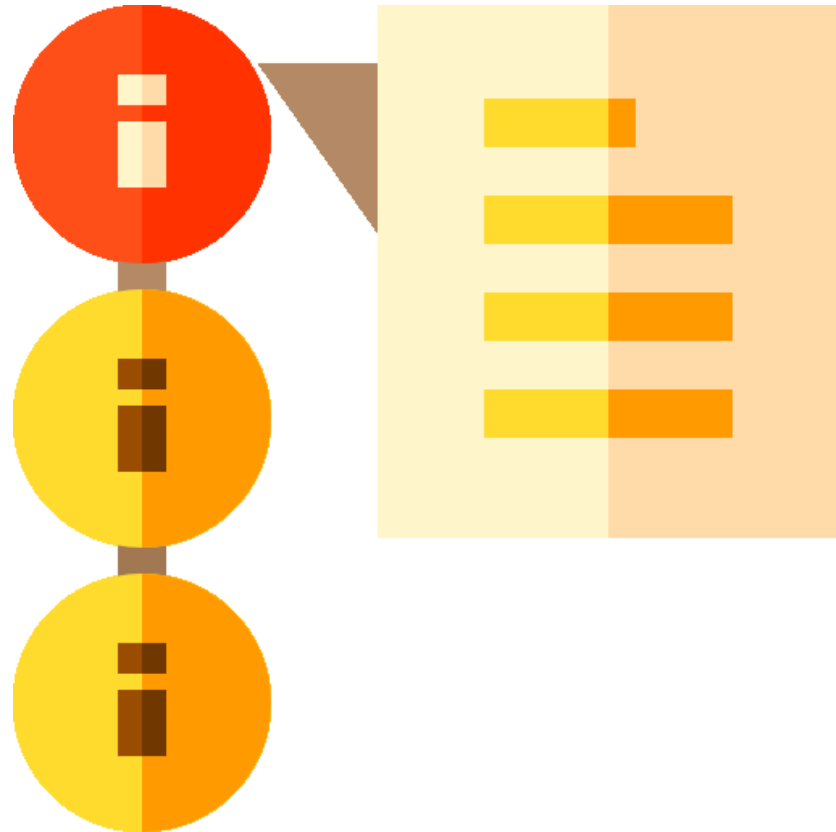
Conduct
Stakeholder
Analysis

Launch/
Kick-off

Develop
Project
Charter

1. Gather Information

- Develop a business case
 - Background information
 - Baseline data
 - Reason for effort



2. Meet the Sponsor

- **Initiate Charter**
 - Discuss elements and obtain input
- **Establish accountability for project oversight**
- **Clarify, negotiate roles and responsibilities**



3. Conduct Stakeholder Analysis



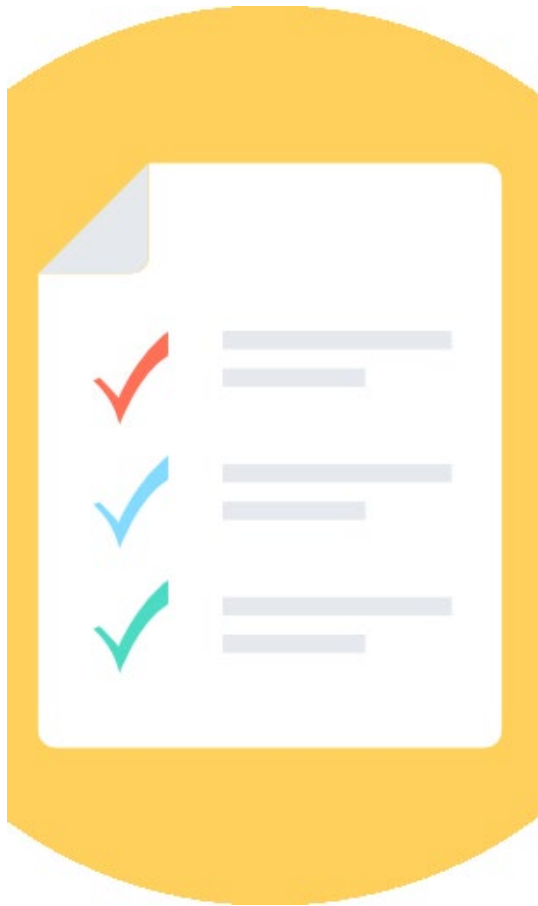
- Identify
 - Who?
- Assess
 - Needs
 - Wants
 - Feelings

4. Launch/Kick-Off

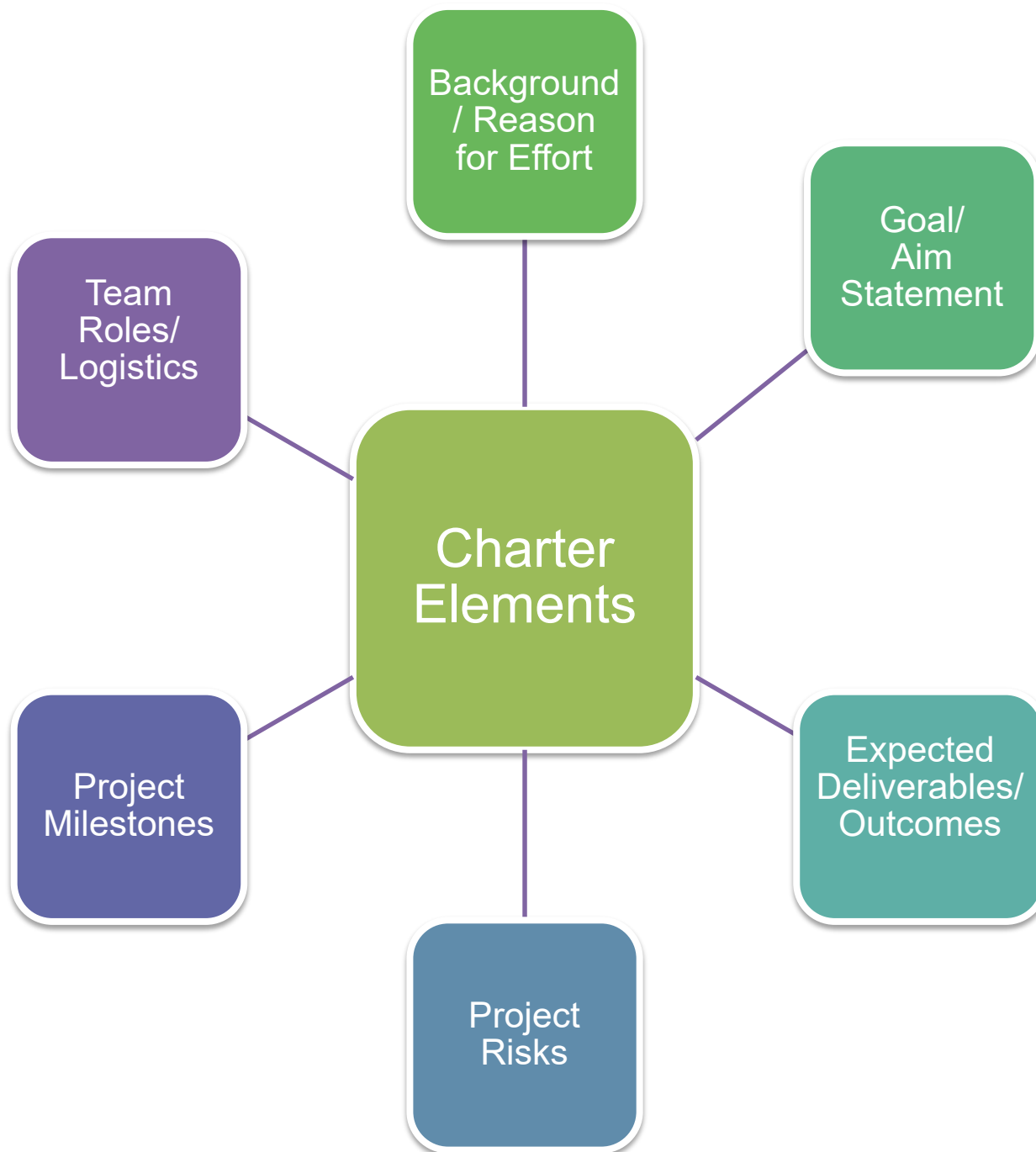


- Set the Stage
 - Context (history/timeline)
 - Background/reason for effort
- Share project requirements and data
- Begin the Charter development

5. Develop Project Charter



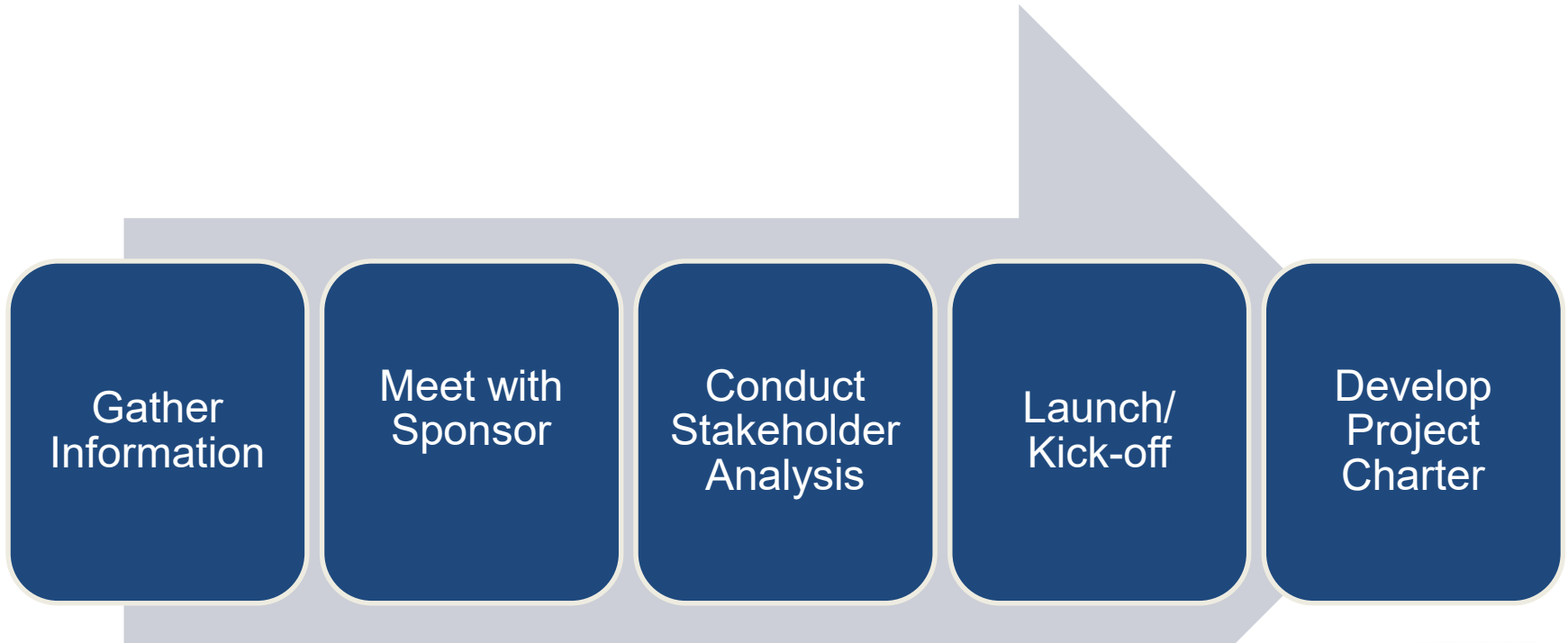
- Purpose of Project Charter
 - Outlines objectives
 - Defines scope
 - Establishes framework
 - Summarizes team agreements
 - Delineates roles/responsibilities



Knowledge Check



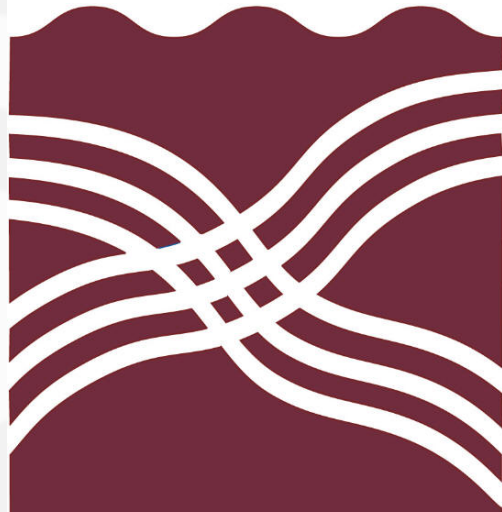
Initiating/Framing: Recap



Questions/Comments?



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HEALTHPLAN

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Phase 2: Planning

Planning Phase: Key Activities

Initiating/
Framing

Planning

Executing/
Monitoring

Closing/
Transitioning

Identify Project
Plan Elements

Create Work
Breakdown
Structure

Document
Communication
Strategies

1. Identify Project Plan Elements

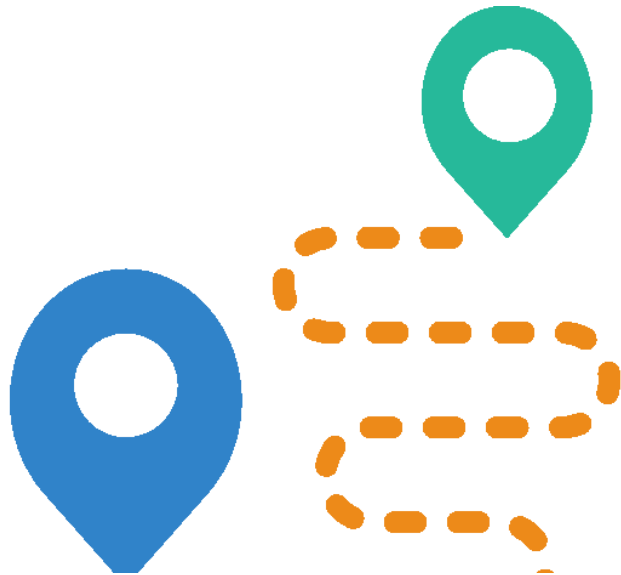


2. Create Work Breakdown Structure (WBS)

- A visual depiction of the project that organizes and defines the scope of the project into manageable tasks



Milestones, Deliverables, and Tasks



- **Milestones**
 - Anticipated points in time where significant project achievements will occur
- **Deliverables**
 - Tangible or intangible goods or services produced as the result of a project
- **Tasks**
 - Measurable and finite unit of work
 - Activity performed in order to achieve a result or objective

Sequencing and Dependencies/Risks



- Sequencing
 - The order in which the work is to be performed
- Dependencies/risks
 - Identify logical relationships
 - Identifying possible variables that would impact cost, time, resources, etc.

Assign Owners and Estimate Duration



- **Owner**
 - Assign individual responsible for task
- **Estimate Duration**
 - Assign a start date and an end date

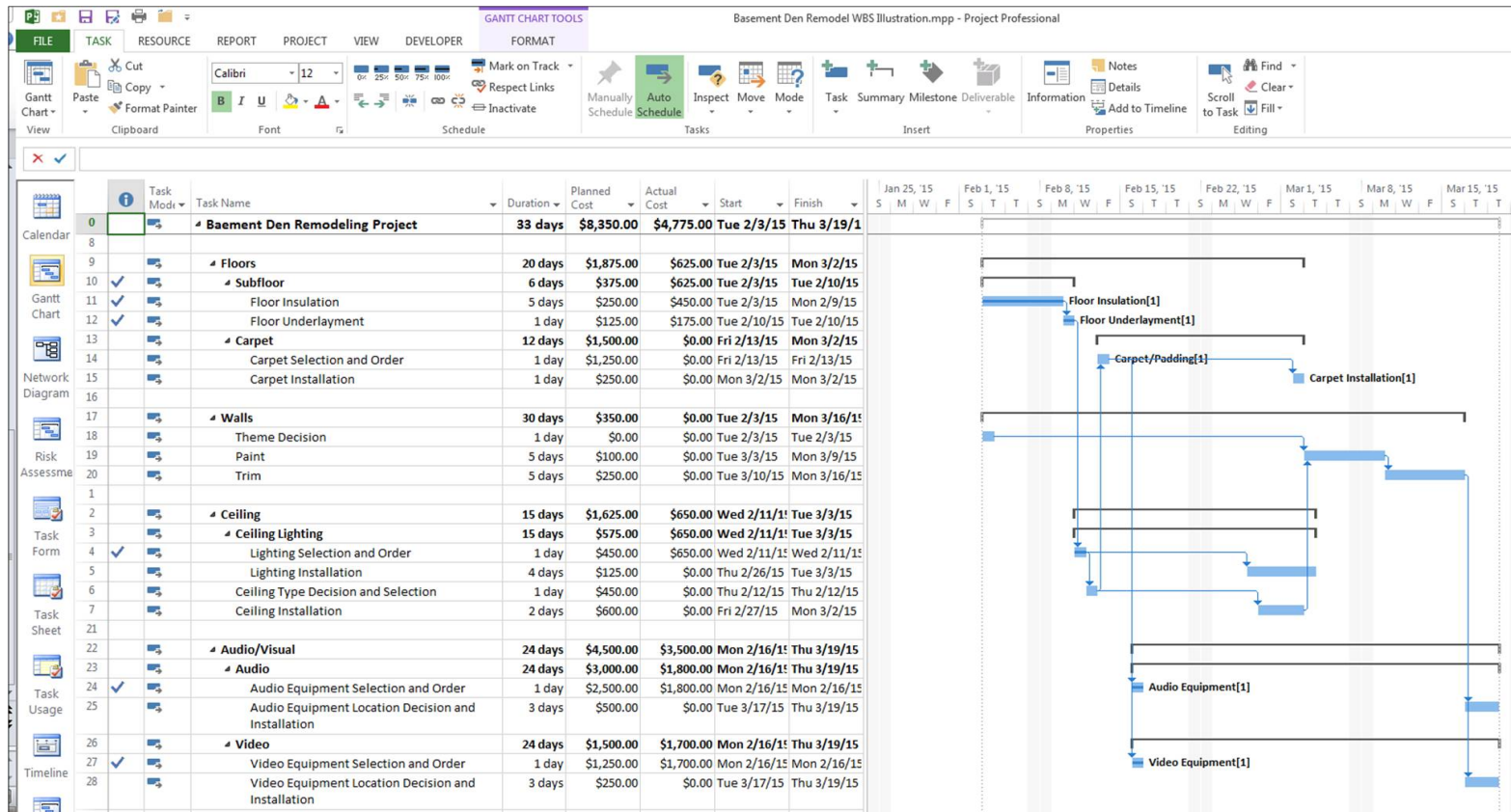
Work Breakdown Structure – Post-its



Work Breakdown Structure Sample

	Milestone/Deliverable/Task	Start Date	Due Date	Responsible
1.0.0	Organize and Scope Quality Improvement Project			
1.1.0	Gather Information			
1.1.1	Surf internet for information regarding change packages			
1.1.2	Obtain information regarding efforts already attempted			
1.1.3	Obtain baseline data			
1.1.4	Identify any regulatory information impacting initiative			
1.2.0	Meet with Sponsor			
1.2.1	Discuss information already gathered			
1.2.2	Identify possible team members and roles/responsibilities			
1.2.3	Clarify negotiate roles and responsibilities of PM			
1.2.4	Establish accountability for project oversight			
1.3.0	Conduct Stakeholder Analysis			
1.3.1	Identify stakeholders			
1.3.2	Develop a survey to distribute to stakeholders re. Needs/wants/feelings			
1.3.3	Compile stakeholder analysis results and identify communication needs			
1.3.4	Develop feedback loop for stakeholders			
1.4.0	Launch/Kick-off			
1.4.1	Prepare meeting agenda and secure space			
1.4.2	Invite team members			
1.4.3				
1.4.4				
1.4.5				

Work Breakdown Structure – Microsoft Projects



Schedule Gantt Chart

Activity	December				January				February	
	1 - 7	8 - 14	15 - 22	23 - 31	1 - 7	8 - 14	15 - 21	22 - 31	1 - 7	8 - 14
1.0.0 Preparation										
1.1.0 Site/Location Preparation	█									
1.2.0 Design	█		█							
2.0.0 Materials										
2.1.0 Tools			█							
2.2.0 Supplies			█	█						
3.0.0 Construction										
3.1.0 Foundation							█	█		
3.2.0 Structure							█	█	█	█

WBS Activity



Project: Build a Shed

- Timeline - Completed by April 30, 2021
- Budget - \$1500
- Team - Class Participants

Work Breakdown Structure - Table

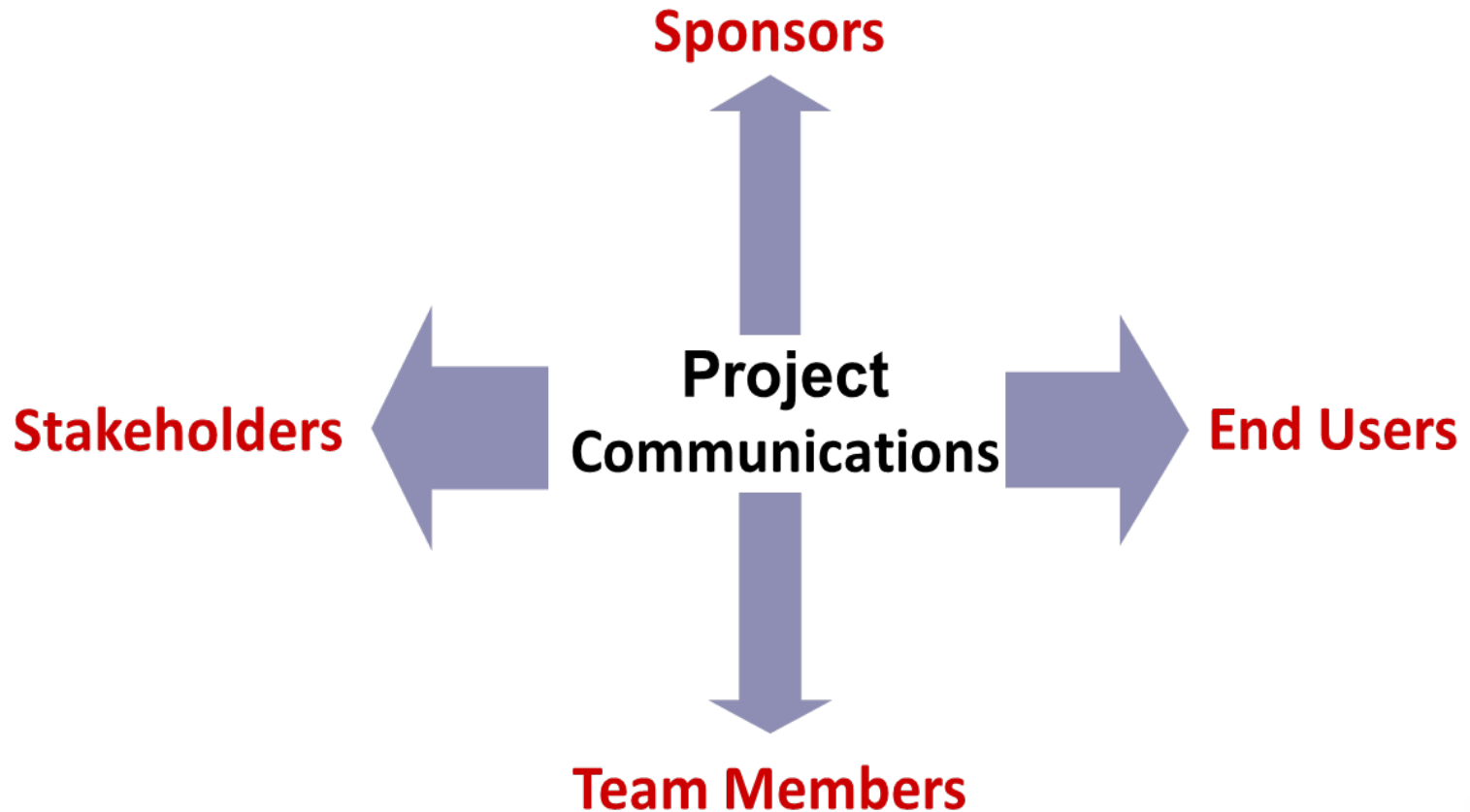
	Milestone/Deliverable/Task	Start Date	Due Date	Responsible
1.0.0	Preparation			
1.1.0	Site/Location			
1.1.1	Select site	12/2/2017	12/2/2017	Me
1.1.2	Clear site	12/5/2017	12/7/2017	Me
1.1.3	Level site	12/9/2017	12/11/2017	Contractor
1.2.0	Design			
1.2.1	Research design	12/5/2017	12/11/2017	Me
1.2.2	Select designs	12/11/2017	12/13/2017	Me
1.2.3	Prepare drawings	12/15/2017	12/28/2017	You
1.2.4	Obtain permits	12/28/2017	1/10/2018	Contractor
2.0.0	Materials			
2.1.0	Tools			
2.1.1	Identify tools needed	12/16/2017	12/17/2017	You
2.1.2	Take inventory of tools	12/17/2017	12/19/2017	You
2.1.3	Secure additional tools	12/20/2017	12/22/2017	You
2.2.0	Supplies			
2.2.1	Estimate quantities	12/15/2017	12/17/2017	Me
2.2.2	Identify vendors	12/18/2017	12/22/2017	Me
2.2.3	Purchase supplies	12/22/2017	12/28/2017	Me

3. Document Communication Strategies

- Effective communication plans ensure:
 - Intended message
 - Appropriate sender(s)
 - Necessary audience(s)
 - Appropriate vehicles/channels



Communications Planning



Communications Plan Example

Communication Objectives		Communication Strategy		Communication Logistics			
Audience	Audience Key Concerns	Key Messages Needed	Strategy/ Plan	Frequency	Vehicle	Developer	Deliverer
Leadership	Timelines and Accuracy of Information	Status of project and issues needing resolution	Send status report to Leadership and key stakeholders	Weekly	Status Report Email	Bill	Maria
Manager	Additional Workload for Staff	Workflow efficiencies will increase after adoption	FAQ with followup Q and A Conf Call	Once	FAQ and Webex Conf Call	Maria	Jan
Staff	Additional Workload / Training	Clarity about roll-out timeline and plan	Conduct in person Q and A with team	Two weeks Prior to Go-Live	In Person Meeting	Grace	Grace

Project Status Report

- Vehicle for keeping leaders, stakeholders, and/or team members and up-to-date



Project Status Report - Sample

[Project Name] Start date: mm/dd/yyyy End date: mm/dd/yyyy

Report Date mm/dd/yyyy

Overall Status

G	On target
Y	Behind schedule/being monitored
R	Needs intervention -

Project Summary

Project Goals

Key Activities and Accomplishments

Planning Phase: Recap

Initiating/
Framing

Planning

Executing/
Monitoring

Closing/
Transitioning

Identify Project
Plan Elements

Create Work
Breakdown
Structure

Document
Communication
Strategies

Questions/Comments



More Project Management

- Project Management Training
 - On-line & In-person
- Certified Project Management Professional (PMP)®
 - Requirement: 36–60 months of experience leading projects plus 35 hours of project management training
- Resources
 - PMBok Guide
 - PMP Exam Prep by Rita Mulcahy

PMI Website

<https://www.pmi.org/certifications/project-management-pmp>

Upcoming Webinars

- **Project Management 101 - Session II**
February 10, 2021, noon - 1 p.m.
- **e-Reports Relaunch**
March 3, 2021, noon - 1 p.m.
- **Member Benefit Delivery System for PCPs**
March 17, 2021, noon - 1 p.m.
- **Involving Patients in Quality Improvement**
March 30, 2021, noon - 1:15 p.m.
- **ABCs of Quality Improvement - 5 Sessions**
Every Wednesday in June, noon - 1 p.m.

http://www.partnershiphp.org/Providers/Quality/Pages/Quality_Events.aspx

Quality Improvement On-Demand Courses

ABCs of Quality Improvement – an introduction to the basic principles of quality improvement. Five one-hour sessions.

Accelerated Learning Education Program – these learning sessions will provide you an overview of clinical measures including: measure specification/definitions, recommendations to maximize measure adherence, promising practices and improvement strategies and tools.

2019 PCP QIP High Performers – How'd They Do That?

In this webinar, two high performers in each category share their secrets to achieving high results in the PCP QIP program.

Additional Learning Opportunities:

- Advanced Access - five part webinar series to improve access
- Tools for Prioritizing Quality Measures
- Change Management/Change Fatigue and QI

Link to all Recordings:

<http://www.partnershiphp.org/Providers/Quality/Pages/PIATopicWebinarsToolkits.aspx>

Evaluations

Please complete your evaluation.
Your feedback is important to us!



Thank You!

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