

Child Welfare IT Managers' Webinar Series: Procurement and Contract Management

“Managing Small Projects - Strategies for Managing Elements of Your Action Plan”

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Coordinator: Welcome and thank you all for holding. I would like to remind all parties that your lines are in a listen-only mode until the question and answer session of today's conference.

Also today's call is being recorded. If you have any objections, please disconnect at this time.

I will now turn the call over to Elizabeth Mertinko. Ma'am you may begin.

Elizabeth Mertinko: Great. Thank you, Laurel. Welcome to the Procurement and Contract Management Webinar Series brought to you on behalf of the Department of Health and Human Services Administration for Children and Families Children's Bureau and presented by ICF International.

Changes in funding availability and priority mean the opportunities for in person discussions and networking among professionals working on agency child welfare IT systems are limited.

As an alternative the Division of State Systems within the Children's Bureau is offering a series of Webinars supporting information sharing and discussion.

The content of the Webinars is structured to appeal to a wide audience participating in agencies child welfare initiatives including state and tribal child welfare staff.

Today's topic is managing small projects in government. And I hope that you all enjoy it and find it to be very interesting.

Our subsequent Webinar topics are negotiating and managing a contract, managing scope creep and change orders and saying goodbye to your vendor. Our next Webinar is scheduled for March 10 and we will be sending out an invitation and registration information shortly.

At this time, I'd like to turn the discussion over to Patricia Mellen, ICF consultant to the Division of State Systems at the Children's Bureau, who will introduce today's speaker.

Patricia Mellen: Hi, good morning, good afternoon. I'm really pleased about today's speaker and not just because he's a fellow Kentuckian. And he's a little bit unusual for us because he's outside of our normal SACWIS world. But I think his expertise has a lot to do with how we work.

Bill Brantley was speaking one day on a project management webinar and he introduced sort of the concept of small project management. And he introduced a set of very flexible, adaptable, Word and Excel-based, project management tools that are kind of available free of charge to anybody with web access.

And as somebody who really hates Microsoft Project, I was really pretty intrigued. And as soon as the webinar was over some of my colleagues and I started talking about his work. And we really thought that his small project

management work was enormously relevant to state and tribal SACWIS environments.

Because for every big development and implementation SACWIS project, everybody on the phone has probably managed or will manage another dozen or so small projects as you move through operations and maintenance.

Once states have implemented their SACWIS system and they have their SACWIS assessment review they typically are then addressing the findings from that review report.

And most of you will have action plans and you're going to address those findings with an action plan. And each one of those action plans is indeed a small project of its own.

When you're working on a system modification or enhancement to your SACWIS system it's the same thing. You have a small project.

So when we heard Bill speak even though it was an international audience of, you know, probably 700, 900 people we just thought his message was so great we called him up and said, you know, you're a federal employee, would you please talk to our audience? And he was kind enough to agree to do that.

So we're asking him to share his insights and share his very easy to use tool set. And maybe he can tell us a little bit about the GovLoop site where his project management toolset is stored.

And a little background on Bill Brantley. He has past experience as I do in state government in Kentucky. But he now works for the Office of Personnel

Management where he's involved in building the data science and project management capabilities for OPM's strategic workforce planning initiative.

He's also a part-time academic. He teaches classes in communication technology, Website development for the University of Louisville on online classes.

And locally here in the Washington area He teaches a course in project management communications at the Project Management Center for Excellence at the University of Maryland's Engineering School.

So he's really an IT and analytics expert. And his research interests include project management, data science and small projects among many other things.

So I'm very pleased to introduce Bill Brantley.

Bill Brantley: Okay. Hello everyone. And I appreciate you all having me come in to talk. I love talking about this topic and want to make sure that everyone understands that they can use this free of charge. There's no copyright or anything like that. And I'm always interested in hearing back the experiences. So love talking to all kinds of different audiences on this.

So let me go ahead and jump on in this. Yes, let me make sure my computer's working. No, uh-oh. There we go. I think my computer's a little slow today. It's kind of cold out there.

So the genesis of this entire idea about small projects came about when I was doing some consulting with a lighting manufacturing company. And I was training their people on project management.

And they - we were going through the usual PMBOK, the Project Management Body of Knowledge.

And I don't know if you have seen that. It's a very, very large book put out by the Project Management Institute. And it's a collection of best practices and project management. And it is a great resource, but it can be way overwhelming.

And for the folks I was training them in about this had a little bit of a classroom rebellion because they said there's just so much in here and there's much we have to do that we feel like we're really spending more time managing the project process than actually managing the project.

So I went and took the PMBOK and thought about well what is the essence of this? What do people need to do to manage a small project?

Now I have a definition of a small project here on the screen. And this is more for IT or HR or training and development -- some of the stuff that I do. And this can change depending on your industry.

When I gave the talk before I worked with a fellow was in construction. And their idea of a small project could be six, you know, maybe six to nine months, but it could be \$1 million project because they're building a building.

And you could talk about the smaller some of the smaller aspects of it like plumbing or electrical stuff can be a small project to them.

Something that would seem huge to me was a small project to them.

So again, the idea of what a small project is, is kind of the way I look at it is the way you can get your arms around it is something that doesn't take too long to complete, it doesn't have that much of a budget, you don't have that many people working on it, but it doesn't mean it's not essential. That's the big thing.

And that's why I also developed the small project guide because a lot of times people will think oh, small project well I can get this done pretty quickly, kind of do it by the seat of their pants, project management and lose out on details, risks come up.

And this is usually a small project that's kind of the, you know, the pebble that - or the straw that broke the camel's back.

You can get the small project done. It delays your big projects, causes a cascading failure.

So I kind of like to have the idea here of your small projects mean about as much as your large projects because they all build upon each other.

So I call this the core management or core project management process because it kind of took the core of what I thought was the essence of PMBOK.

It's also a good way to train people in project management because it gives you a general introduction to the major concepts of project management in kind of easy to use.

And then when your people are ready you can introduce to them the more complex applications, the more complex definitions of those project processes.

Also because and, you know, as we talked about in the introduction, you don't have to use Microsoft Project.

I basically built this that if you had a legal pad and a pencil you could run this project process.

But I often say people, you know, the only thing I'd say is make sure you have things written down.

So if you have Microsoft Word and you know how to create a table you're - or at least the list you're in good shape with this.

And also another thing about this that I always like to stress to people is that it's not only a documentation process. It's a communication process.

So all these templates I kind of envision you taking these and having people sitting around the table looking at the template and helping you fill these out so that everyone understands what's going on here and you have a meeting of the minds here.

Because a large part of project planning is not so much the project plan, it's the planning process and getting people to agree on the scope and the vision and understanding who does what, when and why. So that's the whole thing with the templates here.

And again, customize these how you see fit. And all I ask is that if you customize these please share them with other people. There's no copyright on them or anything like that. Use them, how you like to.

And if you don't mind ping me or send me an email if you made some changes because I'd love to see what's going on because again I'm a project management practitioner but also a researcher and I love seeing what people do with this.

As some examples, Mexican government, someone in the Mexican government contacted me like this. They're using it, fascinating to see how they've tried to change it.

They said the Masonic Lodges in Ohio contacted me. And they're making some changes to it. So love to see what you guys come up with.

So we have different templates here and we'll go through these. And the first one is the project charter. And this is how we get everyone around the table to sit down and talk about what's important in this project, what are we trying to do here?

And again, it's a very simple word document. I mean, you can cut and paste this out. And all you're doing here is getting agreement and also making sure you have a sponsor.

For those folks that may not have that much project management experience, you know, the sponsor is very important. You really need an executive sponsor there to help and then give you the authority and grant the resource capability, basically help you kind of blend their authority so that you can get the project done.

So just make sure that when you talk to the project sponsor and you talk to the project customers and you talked the other stakeholders that they all understand why we're doing this what we're doing and that they agree to it.

So that's why the first part here the project product result and then we had the project purpose.

So we're going to be creating product or result. And the reason why we're doing that is the project purpose. So I want to make sure everyone has an understanding and agreement on that. And then make sure you list your project customers.

And again, really take some time to think about who your stakeholders are. I mean, I'm really begun stakeholder analysis because I tell people before a stakeholder scorned is a stakeholder very angry and can come back and really cause some problems for your project.

So make sure that you do a separate stakeholder analysis. Maybe have another list of that for yourself.

And with your project sponsor I have one there, full contact information, learned this the hard way a couple times when I needed to contact my project sponsor to help me take care of a problem and didn't have the cell phone number, email, or whatever. Just so you know, to get a hold of them.

And this last part here the charter authorizes you the project manager to manage this project or my authority, project sponsor, you know, signs that. So we have a full understanding, they agree to support you and you can take that charter and show other people this is the guy or, you know, lady or person that's shown, you know, that is supporting this project and whose authority I'm working under.

So always start with this and do not proceed any further until you get this taken care of.

Let me go into the scope statement. And again, with project scope for those folks that haven't printed this project before it's essentially what are we going to do in the project, what are the, you know, project, product and results. What are we going to be considering in the project, okay?

And again, you want to have agreement on that. And the best way to do that is to sit down and talk to your customer and have your sponsor number them too and talk about what are the customer requirements?

When we developed this project product or result, what do you want? What do you want to have out of it? Why, you know, again, we know why we're doing it. So in detail what do you want this product to do for you?

And it's very important to do this. And also remember now these are also living documents too.

Okay, now that charter should be pretty fixed. But the scope statement - don't feel like you have to be bound by the first time you meet. You can always go back to it.

But spend a lot of time with the customer understanding what do I exactly need to give to you so that you'll be happy with the project product?

Deadline when, exactly, you know, and try to go for a hard deadline. I know in IT that we often have soft deadlines and stuff. And you can maybe put those in parentheses or whatever. But what is the actual deadline so we can work on the planning part and just have a good agreement on that.

Because again, if you know, if you sometimes give out well when do you think you can have this done? Oh let's see, March or April, you know that people are going to hear the word March, forget about April and you're going to have that delivered in March. So make sure you have an agreement on a good definite deadline.

Budget cap same thing. How much do I - am I - can I spend here? And, you know, how much - what is actually the dead, you know, in other words, how much can I actually spend and beyond that I cannot spend another dollar or another cent? What is my budget cap okay?

And again very important to agree on this from the beginning so that we all know what we're working under.

And then you see this part here and this is kind of strange. What is not in this project scope?

And the reason I put that in there in small projects, especially you have something called scope creep. In other words we had the project customers, we had the sponsors and they all say well we agree that the project product should be this way and we should consider this.

And then about a week later, someone says, you know, I saw this the new feature. Can we have instant messaging put into this or can we have mobile out of this or something like that?

And some of your neophyte project managers say yes we can try to put that in there or they may approach one of your team members and have one of your team members agree to that.

The whole important part here is to say up front these things we're not going to put in the scope. We may save it for another project and especially important for small projects that you really lay out what we're not going to consider this time because you don't want scope creep turning into a larger project or medium-sized project because if you do that you're going to have to go switch to a newer, more formal method of project management or you may have this small project that suddenly just, you know, just jumps up and becomes an incredibly large project, lots of risk going.

You're spending more money and, you know, this whole scope creep thing has turned into a completely different way and you're managing something completely new and you're going to have to start this whole planning process again.

So I know I'm spending a lot of time on that but scope creep is one of the biggest problems you'll face in small projects. And it's a good thing to get upfront and understand exactly what am I going to deliver and what am I not going to deliver and why?

So we get into the project plan worksheets and before we get into them you'll see the very simple to work with, again, modify this as you need to. You know, don't let the project process here rule you. You don't have to fill in these exactly as they're presented.

You want a project process that works with the way you're handling the project and works the best to help you meet that project goal of getting the product out there to the customer's specifications.

So when you look at these templates they seem very simple. That's the way I just have them. I have them just lightweight enough so that it'll be enough to manage the project but not get in the way of doing the project.

So the first thing we have on here is the project team. And again, it's a simple table, name, content, information, any notes you have on them.

And you see I have this column called Type. And this is kind of pretty much common to IT projects because we have a lot of people that work on virtual and we have some outsource and we had some temporary people and they share some resources.

And I just found it was easy for me to keep up with what kind of type of resources do I have here or do I have core project team members, people that are with me on day one till the end of the project?

Do I have people that are temporary? I'm going to call in this specialized programmer for a week. So I have them in for this week and then no more or I maybe sharing someone.

So I've got someone for half time on my project or 1/3 of my time on my project and working for someone else or a couple other projects.

So it's important to note that in the type and also any notes that you need to put in that this person is only available for this week. Afterwards we don't use them anymore, or we can't use them anymore, just so that it helps you with the project planning.

And again keep up with that with your project team because when small projects you may have a small core team to work with but I have found that

sometimes I'll have to bring in people that are subject matter experts or particularly skilled in some area.

And I just need to make sure I have that listed there. So I know how to get a hold of them if I - if something crops up later on the project and I need them back or any kind of notes I need to take to make sure that their functional matter manager or whoever I got them from is okay with that and any other items I need to keep up with.

Now stakeholders we talked about that earlier and this is your separate list here.

And when we talk about stakeholders and small projects, you know, people tend to forget some of the more what I call the institutional stakeholders.

So like I work in the federal agency so of course I have my boss that's one of my stakeholders and executive sponsor. So I'll put them down.

Your project team is your also technically be part of your stakeholders but you already have them listed.

But when I talk about institutional stakeholders we have an Office of General Counsel. And I make sure to have them involved.

We have a communication office because if I do any kind of external and sometimes internal communications I need to involve them.

And also we if anything seems like it might affect congressional relations or any kind of legislation or anything like that might want to get the congressional legislative office involved.

So the whole idea here is that some of these stakeholders will be immediate, will come to your mind. Of course we want to involve that person.

If I'm borrowing someone's team, you know, you know, if - borrowing someone from my team I'll need to make sure that their functional manager is part of my stakeholder list here.

But also remember that you will have a constant set of institutional stakeholders that you may have to work with like contracting that you need to know someone you can contact down there if you do have a snag so you're not rushing around saying who do I need to contact in contracting to help me out of this? You already have that for yourself and good notes on them when I worked with them before and such.

Task list, now we all know what a work breakdown structure and you've seen some of those. And they can be hierarchical, they can be a list or anything.

I mean again, I made this very simple. Task ID 123-8182 whatever you want to call it, just something that you can use to cross reference to some other tables that we're looking at, a description of a task, start date, end date, dependencies. In other words, is there some tasks here that may depend on another task being completed?

Common example I give is let's say you're remodeling your house and you want to do something with a - maybe put a deck out there. So you may have to put in the deck supports first before you put the actual deck up or any, you know, maybe you want to get a grill for your deck, but you need to build the deck first before you can put a grill out there -- that kind of stuff.

So I keep this very simple, basically a list here. And you can post that for the rest of your team to see.

And again when you get to a small project and your task list -- and this is kind of a rule of thumb I use -- if my task list starts jumping to more than 3-1/2 to 4 pages I'm going to start thinking I've got a medium project here and I may need to use a more formal project management method.

Now again, that's a rule of thumb I use for my IT projects and I primarily work with analytic products, projects and Web site development projects and Web program projects and stuff.

So usually when I hit 3-1/2 pages or four pages of task I'm talking about 8.5 x 11 sheet of paper built in Word I've got myself a good-sized project and I need to start putting together a WBS and start doing some more formal project management.

And then tied to that under Tasks Lists are your resources. These are people. I also include other things like office supplies and other resources I would use.

And so I have a resource ID. And sometimes, you know, I use maybe like if it's an office or, you know, some kind of office supply thing, OS1, OS2 -- something like that person, you know, P1, P2 whatever, description of the resource and then the task IDs that this resource serves.

And one thing I always do is that I make sure that for every resource I use there's a task, at least one task ID related to it.

And you may run into this in projects that you have I had before where you may have someone that sees a project out there, sees a project budget thinks

this might be a good time to kind of stuff in a resource that we may not be using, but we wanted to buy this anyway, wanted to buy this neat piece of software, buy this neat piece of training -- something like that.

It doesn't really go towards the project, but it's we got a project budget. We've got some money. We can spend it.

So this helps me keep track of it, some of the accountability.

So again I don't use a resource unless I can tie it to a task. And the more tasks you can the better. You know, of course, watch out for your scheduling.

Cost data, use a very simple budget. And again, this is for small projects. If you have a medium-sized project, a large size project, you certainly want a more formal budgeting system.

But with my cost data I have a master budget, budget by the task, budget by resources, cash flow, kind of more the by the back of the envelope kind of keeping up with the cost, budgeting -- that kind of stuff just to make sure that, you know, I am keep in contact with this.

And also again, it's another communication tool that other people are seeing where the cash is going, what I need, where it's going, what I'm buying and how it's flowing in and out.

And a lot of people ask well, why do you have the cash flow column? Well, sometimes when I'm doing things like conferences and it's like a small project in its own I'll have the master budget, budget by task, budget by resources.

And a lot of this depends on attendee fees. So basically we have a conference where I'm charging people to come to it. And if you worked conferences before you know, most people don't register till maybe a couple weeks or so before the conference begins so a large amount of your cash comes kind of towards the end or just before your conference starts.

So if you have to do things like put down a deposit on a building or get your catering deposit down you're going to need to know if you have enough cash on hand to handle that. That's the whole cash flow idea and then what's going to happen later on when you need to get other supplies. So it helps you kind of do more planning.

And how do you know when cash flow works? In many cases it's kind of experience. So if you do of course the training or a conference you'll get a good feel for when money comes flowing in.

With an IT project one of the things I'd like to do is try to have the money up front, all the money up front, then we can just parse it out. That's not always possible. So we try to do maybe kind of core lead increments -- whatever I can work with.

So that's the project planning. Now we get to the communication management worksheets. And again all these templates are communication tools.

So as I said, I envisioned when I put this together having all the people around the table. We look at these templates, we're talking and we're learning, you know, and we're basically learning from each other what we see this project doing, the task and all that and who does what, when, where and why and how do you want that project product delivered? So it's important to have that up front.

But with the communication you just want to make sure you're and especially with small projects, constant communication with people or at least very frequently.

So very simple communication grid, who do I need to speak to? What do I need to speak to them about? When is a good time? You know, reoccurring appointments -- whatever. How do they like to communicate? This is very important.

Because you'll have executive sponsors. Some love email, some don't like email. They want the phone call or they want you to stop by and talk to them in person.

I work for one boss or had one boss his emails he would only read the first two sentences of an email. So if I - and I usually write - I write novels for emails.

And a lot of times I had learned to write just two sentences to get his attention so he'll read the email.

So you kind of learn the person's communication characteristics. And, you know, don't debate whether that makes sense or not, just how do I get a hold of this person so they get the information I need them to know?

And then why are you talking to this person? Is someone like your sponsor who grants you authority for the project, can get your resources? Is it a stakeholder like a functional manager that I just need to keep informed that they don't really have any decision authority, but just need to keep them informed or is it a subject matter expert?

And sometimes I need to pull them in to help me work with the project and any notes you have there.

So it's very important to have this filled out. And it should really mirror your stakeholder list. You may have some, a couple more people involved on here like some admin assistants or whatever. But it should mirror what your stakeholders are.

So your stakeholder should be part of the communication grid. You may have a few more.

And then the status reports and I have a couple of templates are very simple status reports. Again, modify them to the person you're talking to and to their communication preferences and how they like to receive information.

So we'll talk about those when we get to the end there. But basically, who gets it, what kind of status report do you need, how do they get it -- email, phone, whatever -- any kind of notes you want to put on there, like they don't like reading more than two lines are they like detailed description of the risk -- something like that. So, you know you're getting the person the information they need, how they like it.

Meeting calendars oh, as a project manager, you know, 90% of what you do is communication. And it seems like 90% of the communication's in a meeting. So have a good standing - if you have standing meetings or whatever you do with who, do you meet on a constant basis your sponsor customers? When, if you have standing meetings make sure you have that - sit in there and about.

And essentially you have kind of a short description of the agenda you usually are going to talk about that those meetings.

So these are like the standing meetings, just the status meetings like I'm going to meet with the sponsor and customer every Monday in the morning about project status, any project risks that we see and any upcoming tasks and any resource needs -- short and sweet.

And keep that in mind there so that your meetings are productive and they don't take you away from the process of actually getting the project completed.

Then we come to risk management. This is one of my favorite topics about risk. I just what love talking about risk management, happens a lot in IT, happens a lot in all kinds of projects there.

And again I want to make this process very simple because it is a small project. But do realize that small projects can have enormous risk because they have such a short timeframe. And they have small budget and they have very few people working on them.

So like losing a key person can totally derail the project or getting your budget cut in half can kill it. There's a lot that can really damage a small project given its size.

So of course the familiar Risk Register which is for some of you folks have never seen it before.

All Risk Register is it's just a table of risks that you identified and some information about them.

So again risk ID and I just use that so I can cross reference it to other tables. Description of the risk make that as detailed as you like. I try to go for a good enough detail so I can understand the risk and know some signals that when it's coming.

So for example if I have this risk event that I'm worried about like I'm not receiving the cash flow I need I put in there cash flow problems from not enough people registering for the month of March or something like that just so that I can see that coming up.

And then probability here again when you go in the project management and especially the PMBOK they have all kinds of nice quantitative and qualitative ways to measure risk, to determine risk. But with a small project a lot of times I do this kind of seat-of-the-pants.

And I know this sounds kind of really weird coming from an analytics person. But in some cases I just take a good ballpark guess.

Do I think there's a 25% chance this may happen? Do I think it's a 33% chance it's going to happen? Maybe half and half -- 50%, something that I can put my, you know, put in here that I think is a good guess with it and on the impact one to five in a lot of cases.

So if it's a one not that much of an impact, not really worried about it. If it's a five it can kill the project or can severely damage the project - product to the point that I need to talk to the sponsor and customer now about it.

And then status and what I like about the status here is that I have things in there like is it occurring now, do I see it occurring, has it occurred?

And that allows me to keep up with what has passed and what I think coming - is coming down the road and what we're working with now.

Last updated, put that column as a reminder to myself and the rest of the project team. And it's really important too by the way to get your project team involved in the Risk Register process.

So there are people that are working on that task. I call them my frontline sensors. They can see things happening.

So I often ask them to put in what they see happening in the Risk Register to help me out here. And of course you can always take it out if it doesn't work for you. But it's a good thing to have people sharing this document.

But anyway with the last updated is I want to make sure that if I have a risk ID and a description like the one I was talking about, we don't have enough conference attendees in March I want to see when I last updated that.

Because if it's something I was worried about in February reminds me I better check again in March, maybe middle March to see where we are. And if it's past or if it's even gotten worse, okay?

And the idea of it's this whole thing is that, you know, you should be thinking about risk from the moment you sign that charter or even before you sign that charter to when you deliver the product.

And then this is a very simple impact grid. And again, you can get very complicated with this. All this does for me though is tell kind of tell me how to prioritize my risk management.

Because you can probably have more risk than you have resources or time or people to deal with.

And the idea here is looking at my Risk Register so I have the little probability. I say maybe something's 41% to 60% -- just guessing -- but it has a one on the impact. So goes in the green, not going to worry about it. Maybe, you know, do something about it if I have the time and resources.

If I have something that looks like it's going to be a 40% maybe a 50% and it's got an impact of four, hit the red sign. And there I'm worried about it. And I better do something about that because that's a project failed event.

So if it's something that's half and half it may happen. And it's in the four on the impact it's something I do want to address.

In the yellow region that's kind of again attend to your red first. If you have some left over start with the yellow. And then if you're lucky enough to have enough left over and the green makes a lot of sense to deal with do that.

But this just basically helps you prioritize your risk management and keep up with your risk.

Also another thing is to update this -- I like to update this on a weekly basis myself -- do it more frequently in some cases to see if a risk travels from (an eligible).

So it could be 20%, maybe a two. You take a look at that risk and all of a sudden it's jumped up to a 30% and it might be a three. So it's gone from

green to yellow. So that may be in emerging risk that you need to keep up with.

The last one in this is the risk response and again tied to risk ID, what's your response plan.

You could even link your response plan to something more complete if you want to, another document. But just some kind of yes we know this risk occurs and we have some kind of response plan and the status of that response plan.

Are you enacting it now? Is it just on standby? Okay, whatever you want to use for the status. But at least let you know when you look at this on a frequent basis where my response plans.

And the last update again, very important, when was the last time I looked at this response plan? Do the assumptions that help me create that, the risk that I saw, did that change somewhat? Do I need to change my response plan?

So again with the risk management always keep up with that. Always make sure you have it on a frequent basis and try to involve your team as much as possible in the risk management process.

Then we had some project control plan worksheets. So you've done your planning, you've done your scope, you've got the communication under control.

So at this point, people should be working on the small project task. They should be reporting to you on how much of a task they've completed, how much of the budget's been spent and where you are on the schedule.

So again, the first thing I started with is customer acceptance criteria. And it's - I know we talked about this in the charter and what our - or the scope statement, excuse me, and what are their expectations.

Again, I want to put that in there and also folded it into when I deliver this project or product to you or the result to the customer what are your acceptance criteria? In other words, what does it have to meet so that you accept it? And I like to get to as detailed as possible.

So that's something I can have as a checklist when the project is complete. And I can take it to the customer and say okay it meets all eight of these criteria and you have more if you need them. But it meets all eight of these criteria. So here's your product and you should have it now.

Okay. And this next one is the tax acceptance criteria. Now this is - the first one was for your customer. This is for you as a project manager.

You have the task ID. This is your acceptance criteria for that task. In other words, what does it - what is does that task look like when it's completed successfully? And make sure your project team can access this and see this.

This is basically saying to them when you finish with that task this is how I will accept it. This is what I - this is what you should meet. And then you have the kind of sign off here. It's been completed and accepted, last updated when you basically if you had to you may have it, you know, update the acceptance criteria.

But when you get the complete and accepted and that part there note that date. And you can put the notes column in there if you want to.

But this basically helps keep the project team on track and helps you keep on track with how well they're doing with the task.

Monitoring checklist, again, this kind of comes from the risk but it also comes from the budget and the schedule. It's basically a kind of to do list for the project manager. And these are things I need to check either weekly or daily but it's just essentially what are the things I need to keep up with as the project is progressing.

So it could be something as like, you know, have I updated the risk management plan? Have I updated the Risk Register? Have I checked with, you know, my team or updated my team roster -- all kinds of different things for you to keep up with.

And the threshold's very simple here. What was our budget cap and what is our budget spend so far? And then how much do we have left or how much have we gone over and do we need to have that talk with the sponsor and customer?

And what I like to do with these thresholds is keep these kind of updated daily so that I know what my budget is and what I've spent so far and how much further do I have to go.

And in project management you can even get very detailed. You can have things like burn rates. So in other words I'm spending so much a day that if you project this out I will use of my budget way before I finish the project.

So what do I need to stop spending on or what do I need to do to get more budget or stop spending as much?

Same thing with schedule here, what is the deadline? Where we today and what does it look like, you know, in other words how are we doing progressing on the project schedule? Are we meeting - are we ahead of task? Are we behind task and what do I need to do to talk to the project sponsor and the customer about this?

And then these are the status report template worksheets and again, very simple. And make it as elaborate as you want. This is suitable for phone conversations, suitable for email -- however you want to do it basically the project title, the date, who the project manager is and the deadline, basic information for your sponsor.

And I know it sounds like, you know, many of your sponsors keep up with this. But if you've got an executive sponsor and you're working with a lot of, you know, managers and such, you know, they have a pretty busy schedule. And sometimes they have a lot of small projects they're looking over.

So it does help them out to say okay remind them real quickly this is the project title. I'm the project manager on this one and this is the deadline we've agreed on and it is today's date, just some basic information to help them orient themselves.

So when they see your product status they can understand okay, this is the milestone and this is how we are. Are we reached the milestone? Are we ahead of schedule or are we going to miss the milestone because we didn't have enough resources, our key team member quit on us -- something. So gives a simple, you know, stoplight status -- red, yellow, green, okay?

And that way it gives them kind of quick what do we need to do high level view, talk about some of the issues that you have here, some of the recommendations that you have to confront those issues and what your planned activities are tell next status report -- very simple, but basically helps orient your sponsors and your customers and other stakeholders what have I done, what are some issues that we need to confront or some things we need to take care of, what are some things I need from you and what do I plan to do until we meet next time meet okay -- basic information, keeps them on track.

So that - those are in the templates. And again, you can find this guide in GovLoop. And GovLoop is a social network for government employees put on by a friend of mine named Steve Ressler. And I used to blog for him for a while there, haven't been able to lately just been so busy.

But GovLoop is kind of like Facebook for government employees. And it's a really nice resource.

And they have a section in there if you click on the tab Resources and you can find this manual there and some other good resources for you.

And the government community of practice that's what the PMI, Project Management Institute.

And we have - and I'm the knowledge management lead for that.

And if you go to the Government Community of Practice wiki -- and you have to be a PMI member though by the way to get into this -- but if you have any trouble email me. I'll make sure you get a copy of the guide.

You just click on the Small Project Management Guide and there's an attachment and download this whole thing. And a PDF with all the templates you need and all the instructions on the template.

So I want to thank you for viewing this Webinar and please feel free to contact me if you need advice or want to offer criticism, praise, suggestions -- whatever you need any help from me. It's bill@billbrantley.com -- pretty easy email to remember.

And again, I'll be glad to hear about your experiences. I'll be glad to help you in adapting this project management guide anyway you'd like to.

And I really appreciate having the chance to talk to you and learning more about what you all do. And I'm excited to see how you would use this in your work. So with that I'll turn it back over to Patricia.

Patricia Mellen: Elizabeth do we have any questions?

Elizabeth Mertinko: We do have some questions. And first I wanted to take an opportunity to offer praise. I wanted to thank Bill again for taking time out of the afternoon to present this information. It was really a wonderful approach. So I thought I'd go ahead and lead the charge offering a little bit of praise.

Laurel, could you instruct our audience how to queue up to ask questions on the phone?

Coordinator: Certainly. If you would have a question on the phone lines please depress Star 1 and record your name when prompted. Star 1 please.

Elizabeth Mertinko: Great, thank you. I do have a few questions that have come in online. And we can go ahead and start with those while people are lining up on the phone.

First question it seems that you're assuming that small projects have an assigned project manager and a project team. Often there's only an analyst and a developer that are assigned to a small project.

In this situation is this an over processed approach? How would you downsize the process to adapt to that situation?

Bill Brantley: Yes, I get that a lot too. I mean, I'm kind of an analyst and sometimes just a developer. And yes, you can downsize this to basically what you feel like you need to use to work with the project.

I mean the first thing I would do is to make sure you have the project charter. And we use the whole thing as like I explained there.

Because you do need to make sure that you understand what the sponsor and the customer's vision of the project is and what they want out of it and then make sure you have that authority from the executive sponsor.

I mean, no matter how small your project is you really need that sponsor behind you to help you.

And then with the other templates see what helps you work with it. I mean, again, the scope statement, especially if you're that kind of a small project I would certainly go in there and talk about well what is in my scope, what's not in my scope, what kind of budget am I looking at?

And some of those projects I work with you have zero as a budget but well that's an interesting budget cap.

So make sure that they understand and you understand exactly what that kind of means with the budget.

So I mean if you need like a piece of software that maybe 20 bucks or something can we actually spring for that? You know, those are kind of like well we started going into the micro project world.

And then the rest of the templates again, you know, the communication and the stakeholder and all that you probably can get by without the stakeholder.

Of course I would make sure that you have your task list and your project budget if you have much of a budget and of course the schedule and then status report and such. I mean, you may not have to go that formal if it's a smaller project.

So again what makes sense to you, what makes sense for you to keep up with and what makes sense to communicate to your team which may be just one other person so that you're on the same page with this project and you're getting it done?

Because again even with the small micro project like this person is explaining it may be the linchpin for much larger project. And if you don't get this completed the larger project can't go along.

Elizabeth Mertinko: Excellent, thank you.

So I have some other questions. I'll ask one more and then we'll open it up to the phones and see if there's anyone there.

When it doubt about whether you use this small project process or a more formal project management process, what are some key issues that you would consider?

Bill Brantley: Well again look at the complexity of it. In other words, if you have a large number of stakeholders, you might want to start thinking about a more formal process.

If you're, you know, if it's going to take a longer duration or you have a larger budget or you have more tasks then you can reasonably put on those pages like I talked about I had 3-1/2. It's a rule of thumb for me.

But essentially if it looks like the complexity and you can get a good feel for the complexity of the project it's going to require more than just the templates here and that you might need some formal tracking. I mean it's essentially, you know, you'll get a feel for it.

And again if you're in the middle of a small project and it starts growing bigger certainly get off the templates and start pulling in the more formal project management methods.

But the good thing about this if you start off with small project templates you've got a good starting point to fill into the more formal project management templates.

Elizabeth Mertinko: I like what you said too about just an informal rule of thumb that when you're task list started to get more than I think you said 3-1/2, or four pages

that would maybe stop and think maybe this isn't as small as I originally thought it was.

Bill Brantley: Right, right. I mean, you get some sponsors say oh this shouldn't take too long. And then when you start looking at what they want oh yes, it's going to take a lot longer than you thought.

Elizabeth Mertinko: Exactly, exactly. Laurel6, do we have anyone on the phone?

Coordinator: Not at this time. Once again though Star 1 if you would have a question.

Elizabeth Mertinko: Okay. We do have some additional online questions.

Bill Brantley: Great.

Elizabeth Mertinko: We find that work - doing work as small projects helps the policy administration feel more in control of the IT work. Is this just - is this a common belief or are we just lucky?

Bill Brantley: Well, you know, I kind of run in the same kind of thing too there. And I think again, yes with this kind of - I found the reason why I use these templates myself is the communication.

And there's an emerging idea with IT and you may have heard about it, call dev ops. Basically, it's your development team working with your operations team in IT.

And I'm kind of thinking may be also dev ops program which is basically our development team working with the operations team in IT. And the operations team is the people that run the network, keep things going and also getting the

program people in the office and understand why the developers are doing what they're doing, why the operations people are doing what they're doing and why the program office, you know, the policy people need what they need.

So, you know, I'm - and of course, you know, teaching project management, communication, we always think that's important there. And I really emphasized the use of communication here.

But yes, I mean the nice thing about these templates it it's documented, people are going to look at these. They can easily understand it even if they're not a project manager. And say yes, the dev team knows what they're doing and the IT folks know what they're doing and that makes the policy people feel better.

And the good thing too is when you get the policy people in there and they're also telling you what they want it makes the communication, the vision helps out a great deal in understanding each other.

Elizabeth Mertinko: Okay perfect. You had said earlier that you like talking about risk. So we do have a risk question. How often do I need to update my risk assessment?

Bill Brantley: My rule of thumb on this is looking at my deadline so again five months. I personally, you know, don't let more than a week pass by every other day in some case is what I like to do.

And, you know, and I hate to give you kind of a rule of thumb, but that's a lot of - that happens a lot on informal, you know, in small projects you have a lot of informal rules of thumb.

Depending on the phase I'm in if we've got a lot of planning and such and you don't have to really check your risk as much because you've done that up front.

But when you're doing the monitoring, controlling and the actual task work is being done. I'll check the risk more often.

And in some cases if I know I have a team member who I'm borrowing for a week. I'll check them very frequently and check the risk very frequently, because that can be if something happens in the middle of the week and I need them for an extra day or two I need to know that as soon as possible so I can talk to their functional manager or talk to the contracting officer or something like that.

So I wouldn't let more than a week go by, especially given the short timeframe you have. But every other days, I like to do it every other day.

Elizabeth Mertinko: Okay good answer. With a big project you probably have an executive steering committee or an oversight board. And with a small project when do you escalate a problem in the absence of that sort of board or that sort of committee?

Bill Brantley: Again, you know, look at your risk management and also take a look at when you prepare your status report to your sponsor and such. With risk management plan you should have in there as part of your plan when I should start escalating, okay, when I should talk to my executive sponsor and tell them what's going on with a customer is.

So I look at my, especially I look at my risk priority grid. If it's something in the yellow I do want to tell them that, you know, we're looking out on this

okay and give them kind of in advance warning but maybe not need something they need to step in on.

If it's in the red clearly I want you to come in. I need to talk to you. So that's why I also say, you know, check it and see if something's migrating from green to yellow to red so that you can again good rule of thumb here is like if it's starting to migrate from green to yellow may be a good time to go talk to the sponsor and say hey there's something that may be occurring. I may need your help later on.

Elizabeth Mertinko: Okay. Laurel, do we have anybody on the phone?

Coordinator: No, ma'am, we do not.

Elizabeth Mertinko: Okay.

Patricia Mellen: Elizabeth, this is Patricia.

Elizabeth Mertinko: Yes.

Patricia Mellen: I'm just going to add something to Bill's statement about, you know, identifying or raise some risk to executive sponsor.

And I think sort of the same thing goes for the action plans where, you know, often a state will say to their federal analyst, you know, we're going to get this done in six months.

And if something is red and, you know, you really think it's going to be a serious problem it's probably a good thing to bring up on the next monthly call with the federal analyst to say, you know, I have an issue with this

implementation so that you don't sort of have a surprise when it's time for your next APD update.

Bill Brantley: That's a great point there. I mean the only time I learned the executives like to be surprised is on their birthday. Other than that they don't like to be surprised. So...

Elizabeth Mertinko: I have a question that came in online. Sometimes we're of the mindset that small projects are simple and large projects are complex. But that's not really always true.

Sometimes small projects are more complex and on the other hand, a large project can be large, but simple.

Isn't it really about having a PM methodology and repeatable processes in place that breed success?

Bill Brantley: Exactly yes, yes. And that's why I have this here. And you're right, I mean I've seen some programming projects that may be small, a couple people, but they're complex projects, compared to when I was talking to my friend in construction where yes, it looks like a large project, but you're basically building a building that had been built probably hundreds of times before, it's pretty simple to do. We know what we need to do and it's just follow the steps there.

So right I mean and that's why this small project versus medium project to large project it really depends on your industry and how you define that and the risks that you're taking there.

So again, some of the complexity it can be the schedule, the task, the budget but also what the heck are you producing, you know, what is your project product and the complexity involved in that?

Elizabeth Mertinko: And sort of related to that but from a different questioner, a different person on occasion we formalized a very small change request into a small project due to the high profile of the work read high risk if it's not implemented correctly.

Do you have any other examples of where it may make sense to do this when the work otherwise wouldn't necessarily meet the criteria for a small project?

Bill Brantley: Let's see, oh, you mean like a really small project, I mean a small task or something like that?

Elizabeth Mertinko: Yes.

Bill Brantley: Yes again, take a look at the impact of that task too because if there's some larger projects that are dependent upon that that could, you know, may need the formulization just to make sure it gets done.

For example sometimes, you know, I do some training, conferences, a lot of training conferences and catering, you know, is pretty cut and dried in a lot of cases.

But sometimes if you don't have the good catering it can affect the whole conference itself, the whole morel and how people we perceive it and such.

So sometimes I'll make sure my catering is good and I'll turn it into a small project just so I don't have to worry about that when the conference happens, okay?

So that seems like a small minor detail, people don't think about that. But it can be a large project, a large complication especially if you have catering where you don't watch out for people's food allergies or any other kind of threatening situation there that could really impact your conference. So that may be one example.

So again if it's a small task and it looks like though it's going to be the linchpin for a larger project or it looks like it may have been inordinate effect, okay, on the larger task of what you're doing or larger project you're doing I would still formalize it.

Elizabeth Mertinko: Going back to the discussion we had a few minutes about risk assessment -- this isn't a question but somebody had commented online -- I'd like to add that the more team members you have and the more components there are that you don't have control over the more often you'll want to check your risk assessment.

Bill Brantley: Yes. Oh yes. I mean, that makes a lot of sense because, you know, with more team members, you get communication channels, more instances of misunderstanding, more dealing with people and people always come with their own interesting ideas and ways of doing things. And you have to kind of manage that, yes, and tasks.

I mean the complexity, and I did an article for this at GovLoop basically showing how quickly project complexity can grow. You know, it's not a simple linear relationship in a lot of cases. It's - it can explode on you.

Elizabeth Mertinko: Absolutely. Do you think it saves time in the long run to organize into a small project? For example, have you found that there's less rework?

Bill Brantley: Yes, yes and the reason why is because, again, we do a lot of the planning upfront. We get a lot of the expectations documented upfront.

And we get people sitting around the table and they also understand the risks that are involved and understand what we can do and what we can realistically can do.

And that helps. When you get a - when you can do a lot of that in the preplanning actually doing the project goes a little bit faster. And, you know and your people know exactly what they have to do. So that does cut down on the rework.

And also, you know, you have a good risk management process in place there that helps also cut down on it.

Elizabeth Mertinko: It seems like stakeholder satisfaction might be higher too because you've done a more formal and maybe a better job of managing expectations.

Bill Brantley: Yes.

Elizabeth Mertinko: Does that seem fair to say?

Bill Brantley: Yes it does. And that's one reason I like this because - and that's why also make sure my institutional stakeholders are involved.

Because, you know, people the - you know, often the general counsel here loves it when you can include them in stuff and you tell them ahead of time. They like it, communication likes it.

And it's just developing that relationship that you're the person that you'll tell someone something's happening and they can count on you to tell them and be, you know, and don't surprise them.

And if you get their expectations meet that usually helps you with the other stakeholders. But you're not...

Elizabeth Mertinko: I was also thinking back to the beginning too where you were talking about what this project is and what it isn't. And it feels like really clarifying that upfront means you don't get to the end with somebody's thinking well I thought we were going to do this or I thought I was going to have this. But that's been clarified upfront.

So, you know, people's expectations are very much in line with where you're focusing your resources and the work that you're actually doing.

Bill Brantley: And I find it's kind of important because with a small project, you may have this kind of conversation with your boss. You know, we need a mobile app that does this and this. And I saw that on CNN last night. We should have that too. Could you go do that for me?

Now I just told you all that that I'm leaving the office and I swear, maybe it was just me maybe because I'm getting older, I don't remember half of what this person said.

And they had an idea in their head. And I have an idea in my head and it helps when we sit down at the table and actually document all of it. What is this going to be about? What is this not going to be about?

Oh, if you want to include that than this is going to be a much bigger, I'll need a bigger budget. I'll need some more people. Yes.

Elizabeth Mertinko: It's not a small project anymore if we do that.

Bill Brantley: Exactly because in their minds they may think it's small, but it isn't.

Elizabeth Mertinko: I'm one of those people. I never - I always underestimate how complex something will be. And I'm the - could you just, could you just add this, could you just add that?

And so it's very important. If I'm one of your stakeholders that I get that real clarity about that's, you know, maybe outside the scope or that's not as small as you think it is so...

Bill Brantley: Right. And that's - and it's always important when could you just people come to my team members and say run away from them politely but don't...

Elizabeth Mertinko: I'm always doing that.

Bill Brantley: Yes, but don't agree right away. Come and talk to me first, okay? I know you're trying to be helpful and I know you want to keep the stakeholder happy, but we've got to really think this through.

So, you know, it's pretty important because yes...

Elizabeth Mertinko: I have another question that's coming online. Does the small project require comprehensive test plan depending on the complexity?

Bill Brantley: Yes, and in fact with, you know, my IT projects I like the idea of continuous testing, continuous development, you know, the whole unit testing thing.

Because again with the small project the size of it, and someone brought up earlier about the complexity, the complexity even though it is a small project can be kind of overwhelming.

So it is always a good idea, especially with IT projects to have a good test plan in place. That's just part of your risk management.

And, you know, it's so easy nowadays because the tools make it so easy to build something pretty quickly.

I mean I do Drupal Development which is a content management system. It's a great enterprise platform to build applications in.

And sometimes it makes it too darn easy for me and I forget to do critical testing.

Elizabeth Mertinko: Interesting. That's a really good point.

Bill Brantley: Yes.

Elizabeth Mertinko: Laurel, do we have any questions or comments on the phone?

Coordinator: No, ma'am, we do not.

Elizabeth Mertinko: Okay. Well, I've run through everything that has come in online. So Bill, I just want to take a minute again to thank you for sharing these tools with us. I think they're wonderful resources for audience.

And I want to encourage people to check out the site and also to share the PowerPoint and share the presentation with your colleagues.

As with all of our other webinars we have recorded this webinar and it will be made available on the Children's Bureau web site.

And I also wanted to remind audience that our next webinar will be on March 10 from 2:00 to 3:30 PM Eastern Time. And that will be on contract negotiation and management. And keep your eyes peeled for the invitation registration information for that.

And Patricia I didn't know if you had any final words?

Patricia Mellen: No. I'd just like to thank Bill for speaking to our smaller audience than he's used to. But I just thought this was wonderful and really appreciate your time.

Elizabeth Mertinko: Great. And Bill?

Bill Brantley: Oh I appreciate and I appreciate the opportunity. Yes. Thank you so much.

Elizabeth Mertinko: Any...

Bill Brantley: And please feel free to contact me.

Patricia Mellen: And yes and remind people if you do use Bill's tools and decide to change them let him know how.

Elizabeth Mertinko: Yes, absolutely. Oh wait I have one last comment coming in online. Oh thank you someone has said. Thank you again from all of us. This was wonderful. So thank you so much.

Bill Brantley: All right.

Patricia Mellen: Bye.

Elizabeth Mertinko: Wonderful. Bye. That concludes our Webinar.

Bill Brantley: Okay bye-bye.

Coordinator: That does conclude today's presentation. Thank you all for joining. You may now disconnect.

END