COLLEGE UNION FOUNDATIONS

FIVE TIPS FOR A SUCCESSFUL PROJECT

March 2025

Objectives

We will cover:

- Core Project Management Principles
- Same language, principles and structure as PMP training
- Just enough to get the job done …Nothing more

By the end of this session, you will learn:

- The five phases of a project
- Key deliverables from each phase
- How to manage risks and issues
- Pitfalls to avoid when leading a project

Let’s get started!

What is a Project?

"A project is a ***temporary*** endeavour undertaken to create a ***unique*** product, service or result."

Project Management Institute

Some examples of projects….

Every Project needs a Project Manager.

A Project is made up of 5 Stages..

According to the PMI a Project is made up of 5 different stages or “process groups”

We are going to look at each of these different stages.

At the start of a project you generally have 2 things:

1) Idea/Goal:

Goals can come from many sources:

E.g. You, the administration, students

This goal is outlined in a **Project Charter**.

2) Reason to achieve goal:

The reason why you do a project can be:

Strategic, financial (reduce cost, increase revenue), expand reach, increase engagement

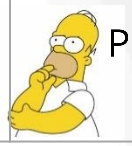
This reason is outlined in a **Business Case.**

Initiating → 1 Project Charter

A Project Charter can include:

- High Level Requirements
- Rough budget & project deadline
- Primary stakeholders
- Any other important info e.g. risks

Deliverables	Responsible

▪ Project Charter Doc.
  ▪ Email
  ▪ Conversation
	 Project Sponsor or Project Manager 

A Business Case can include:

- Benefits/business impact
- Return on Investment (ROI)
- Project Scope
- Impacted Teams / Systems

Deliverables	Responsible
▪ Business Case	Project Manager

Initiating → 1 Project Charter → 2 Business Case → 3 Stakeholder Register

We also need to define our project stakeholders.

Who are your Stakeholders? Stakeholders include anyone impacted by the project.

Project Sponsor is typically *the person asking for the project to be completed*. Normally, they also control the money and people. The sponsor has influence within (and outside) the organization to resolve project politics.

Project Team is generally made up of *cross functional members* brought together to complete the project. They generally do the work required.

Key Stakeholders are *important* stakeholders who need to be involved and kept up to date on project progress.

Customer/End User are stakeholders that also need to be considered/included in project. You want to deliver a final product that exceeds their expectations!

Initiating → 1 Project Charter → 2 Business Case → 3 Stakeholder Register

The **Stakeholder Register** is a great tool to use. This document captures stakeholders and basic info about them. It's helpful during a project transition to know who has influence on your project so you can engage them early.

Here is an example of a Stakeholder Register.

File Automation Forms Connections Dynamic View

Stakeholder Register

	Done	Program/Volunteer Team	Name	Title	Role	RACI	Comments
1	☐	Regional Conferences	April Joy Nietes-Rudnick	Regional Conf Coordin:	Region I Coordinator	Responsible	Use April's planning spreadsheet; her tool is easy to use and captures key details for regional planning.
2	☐	Regional Conferences	Mikey Bullock	Regional Conf Coordin:	Region II Coordinator	Responsible	Works well with the RD (Kat Masters). This is his second year in a FT role (post grad); has good insight into what students need.
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8	☐	Regional Conferences	Avion Wick	Inclusivity Coordinator		Consult	New to the inclusivity coordinator role, is at ASU, very excited to lead DEI activities. Tap in Avion for other opportunities throughout the year.
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12	☐	Regional Conferences	Eddie Seavers	Inclusivity Coordinator		Consult	
13	☐	Regional Conferences	Isaac Barber	Inclusivity Coordinator		Consult	
14	☐	Central Office	Melanee Stewart	Membership	Addressing membershi	Responsible	
15	☐	Central Office	Marcos Fausto	Marketing	Regional Marketing	Responsible	Find out how other regions are leveraging socials and the tools Marcos is creating for them.
16	☐	Central Office	Jonathan Morgan	Data	Registration Setup	Responsible	Ensure liaisons review all reg reports before sending to ams@acui.org. Streamline how the reports are setup as there will be 8 to do.
17	☐	Central Office	Karen Keith	Finance	Training on handling fin	Responsible	Karen will advise on expense reports, per diem, cash advance and when you need to request these items.
18	☐	Central Office	Liz Stringer	Membership/Marketing	Training on Eventsentia	Responsible	Liz trains teams to use Eventsential. If there is a recording, get that from Liz. She may want to use that rather than another trainining session.
19	☐	Central Office	Justin Rudisille	Content	Training on Auctria	Responsible	Tap into Justin for best practices on using Auctria.

Q. Why do we need a register?

1) Don't forget important stakeholders!
2) Other team members/PMs can quickly see who is involved/key people.

Initiating → 1 Project Charter → 2 Business Case → 3 Stakeholder Register → 4 RACI

The final thing we do in Initiation is start to fill in the RACI!

Who is RESPONSIBLE, ACCOUNTABLE, CONSULTED, INFORMED? Your Stakeholders.
Stakeholders include anyone impacted by the project. **The RACI assigns project roles to the Stakeholders.**

Quick activity: each person gets a blank copy to fill in departmental RACI for each program/service then full model shown on screen

Program	CEO	Education	Finance, Admin, Corp Dept	Strategic/DEI Dept	Outreach	Volunteers
ACUI Annual Conference	A	R	C	C	C	R
Bulletin	C	I	I	I	A/R	
Clay Targets Program	C	I	A/R	I	C	
Education and Research Fund	A	R	C	C	C	R
Closing the Gap	I	I	I	A/R	C	C
Women's Leadership Institute	I	A/R	R	I	I	
Volunteer Development	I	A/R	I	C	C	R
NODA Conferences		A/R	I	I	I	C
Awards & Scholarships	C	A/R	C	I	I	C
IACLEA fulfillment	I	I	R	A	R	

NOTE: RACI Definition
R - RESPONSIBLE - "The implementors" - Individuals who are responsible for execution/implementation of a decision/action. R's can be shared.
A - ACCOUNTABLE - "The buck stops here." Sponsor e.g Individual who is ultimately accountable for the decision/action
C - CONSULTED - "In the loop" - individual consulted prior to a final decision action is taken; two-way communication
I - INFORMED - "Keep in the picture" - the individual who needs to be informed after a decision or action is taken.

Initiating

Let's review:

Initiating → Planning → Executing → Monitoring & Controlling → Closing

1 Project Charter — High level description of project

Tool	Responsible
▪ Project Charter ▪ Email ▪ Conversation	Project Sponsor or Project Manager

2 Business Case — Business reason for project

Tool	Responsible
▪ Marketing Plan ▪ Budget	Project Manager

3 Stakeholder Register — List of everyone involved in project

Tool	Responsible
▪ Project Charter ▪ Smartsheet	Project Manager

4 RACI — Who is responsible, accountable, consulted, and informed?

Tool	Responsible
▪ Project Charter ▪ Smartsheet	Project Manager

What happens if you forget to invite your vice president?

Initiating → Planning → 1 Scope

Where do I start??

Now you have a goal.. Next you need a plan!

First place to start is by defining the **Project Scope**!

Project Scope is like a detailed project charter/charge, it contains:

- *Detailed* Requirements
- *Accurate* budget & project deadline
- *All* stakeholders
- Any other important info e.g. out of scope, assumptions etc.

Here are the basic steps.

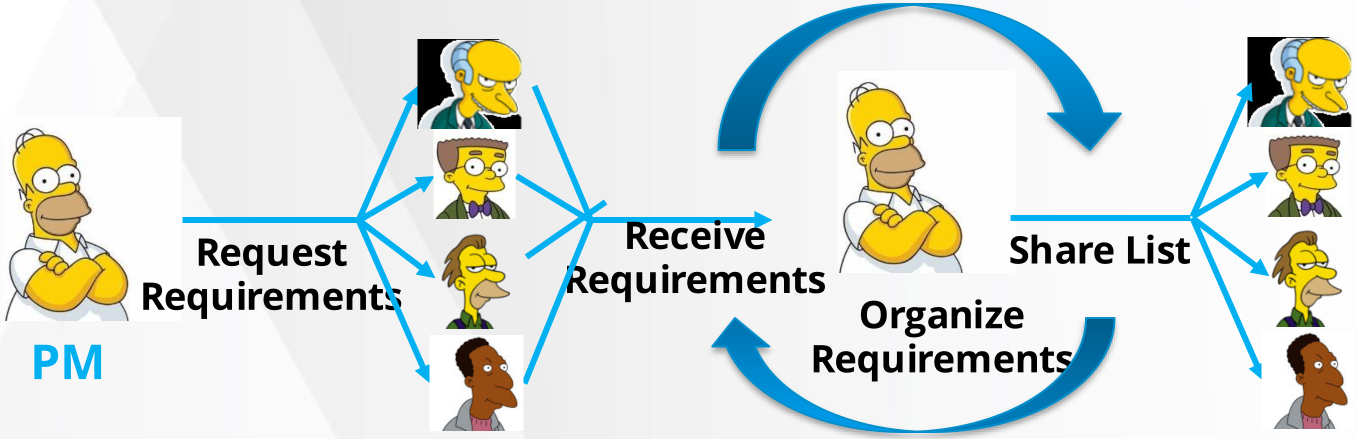
Initiating → Planning → 1 Scope

Here are the basic steps.

1) Define all your stakeholders (update your register!)
2) Collect detailed project requirements from them.

Warning! Make sure all stakeholders are heard!

Use the **DELPHI Method**!



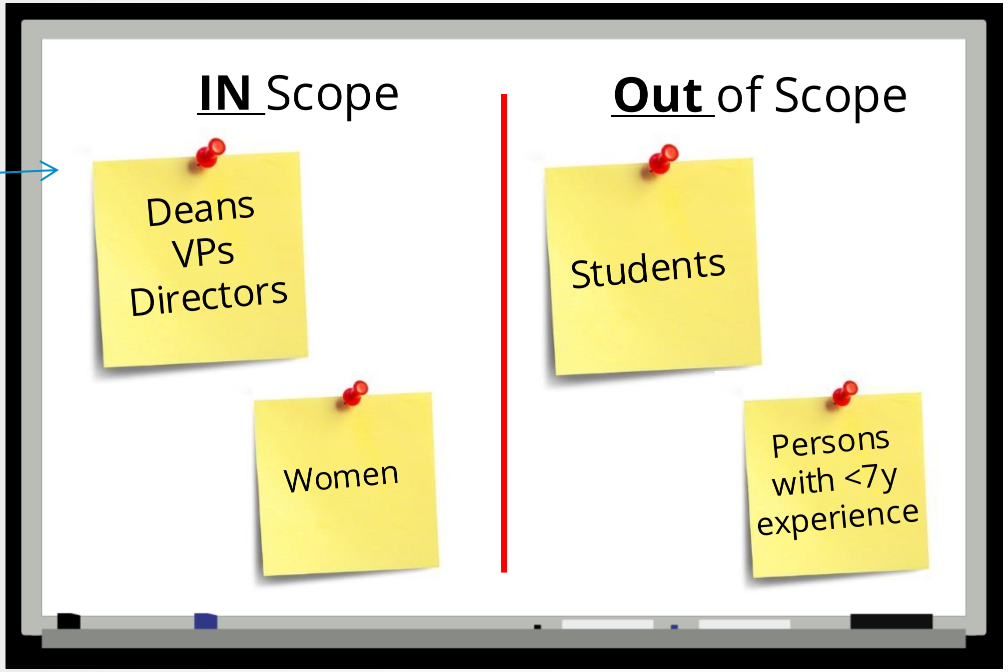
Repeat process until you have agreement!

Initiating → Planning → 1 **Scope**

Here are the basic steps.

1) Define all your stakeholders.
2) Collect detailed project requirements.
3) List In/Out of Scope.

Use a brainstorming session to help refine scope!



Objective: everyone leaves with a clear picture of the project goal.

Initiating → Planning → 1 **Scope**

Here are the basic steps..

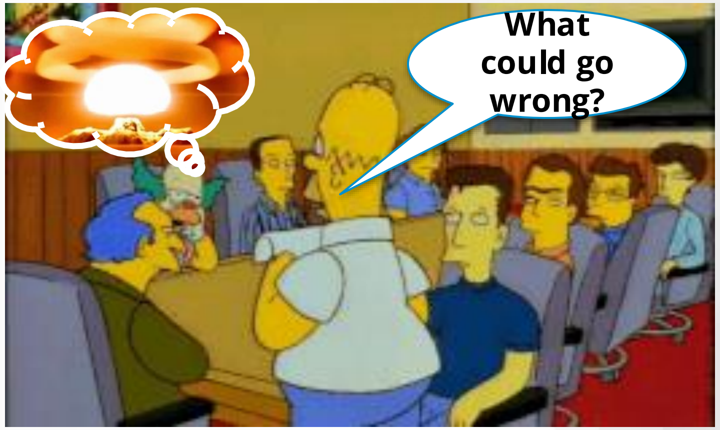
1) Define all your stakeholders.
2) Collect detailed project requirements.
3) List Out of Scope
4) Define actual costs and durations

Include costs for:
- ✓ Labor e.g. speakers, facilitators, contractors
- ✓ Non-people cost e.g. equipment, supplies, facility etc.
- ✓ Ongoing maintenance costs after Project is finished e.g. software licenses etc.

For cost and duration estimates use:
- **Quotes**
- **Expert Judgment** (We did that before and it cost us $$$ or it took #days)
- **Benchmark** (What has an association (similar in size) spent on this effort?

Project estimates include a contingency to account for risks.
Rule of thumb: ~10% of final costs.

Initiating → Planning → 1 Scope



Here are the basic steps..

1) Define all your stakeholders.
2) Collect detailed project requirements.
3) List In/Out of Scope
4) Define costs and durations.
5) List known risks & assumptions.

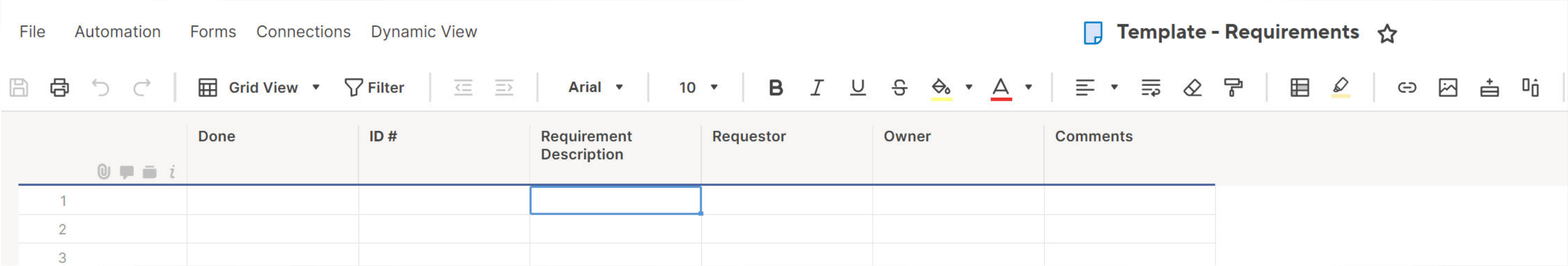
Ask your stakeholders:

"If you are sitting here in a year and the project was an unmitigated disaster. What went wrong??"

Use:

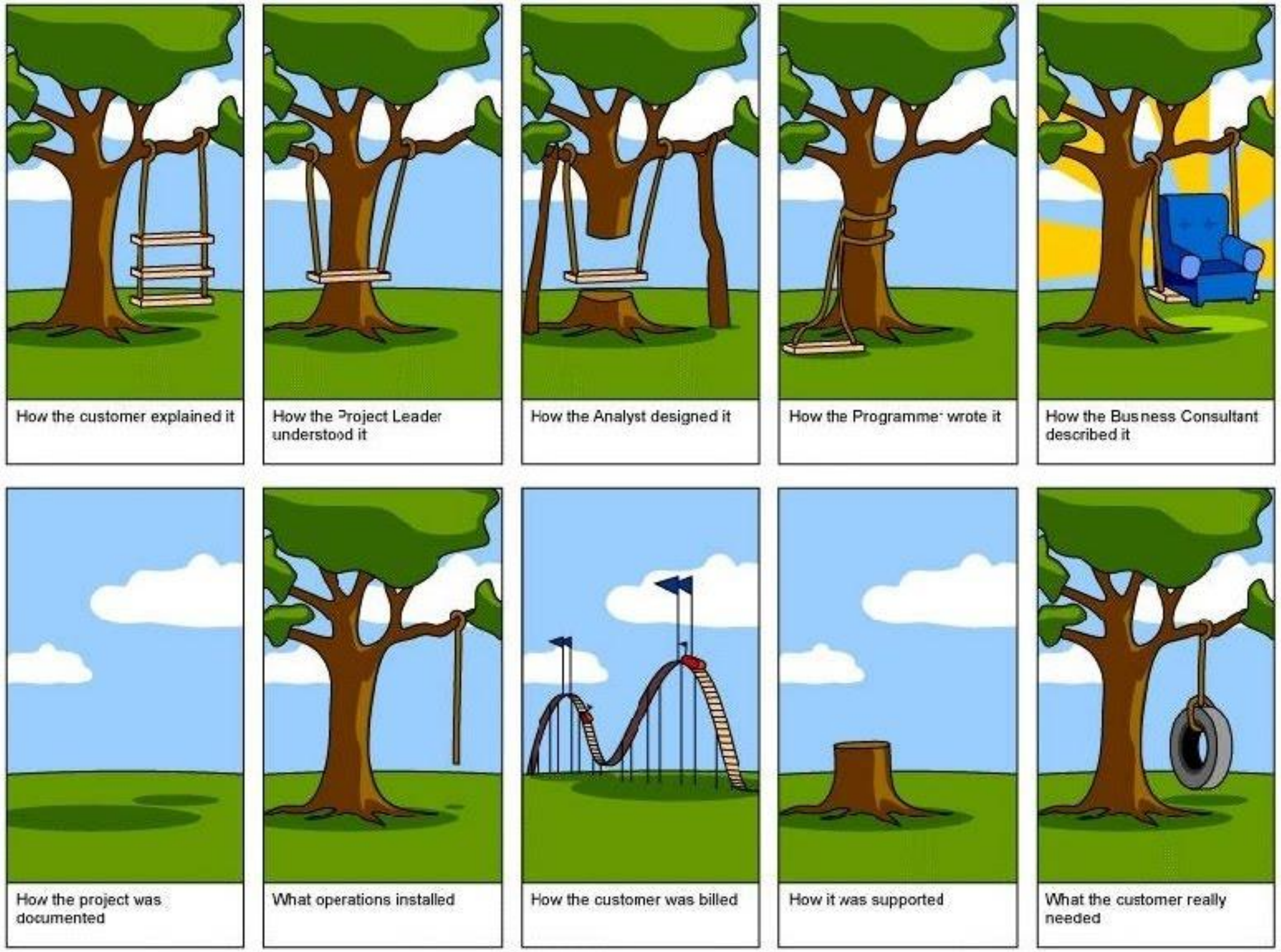
- **Expert Judgment:**
  - We did a similar project and x/y/z went wrong (or went right).
- **Benchmark:**
  - Even if people on your team have never done this before, someone has done something similar. Look for lessons learned on Sharepoint, by interviewing staff, speaking with the prior PM.

It is always a good idea to **list the project requirements** somewhere everyone can refer to them! Here is a sample Requirements Matrix.



Initiating → Planning → 1 Scope → 2 Requirements

Q. Why are clear/concise scope & requirements very important?

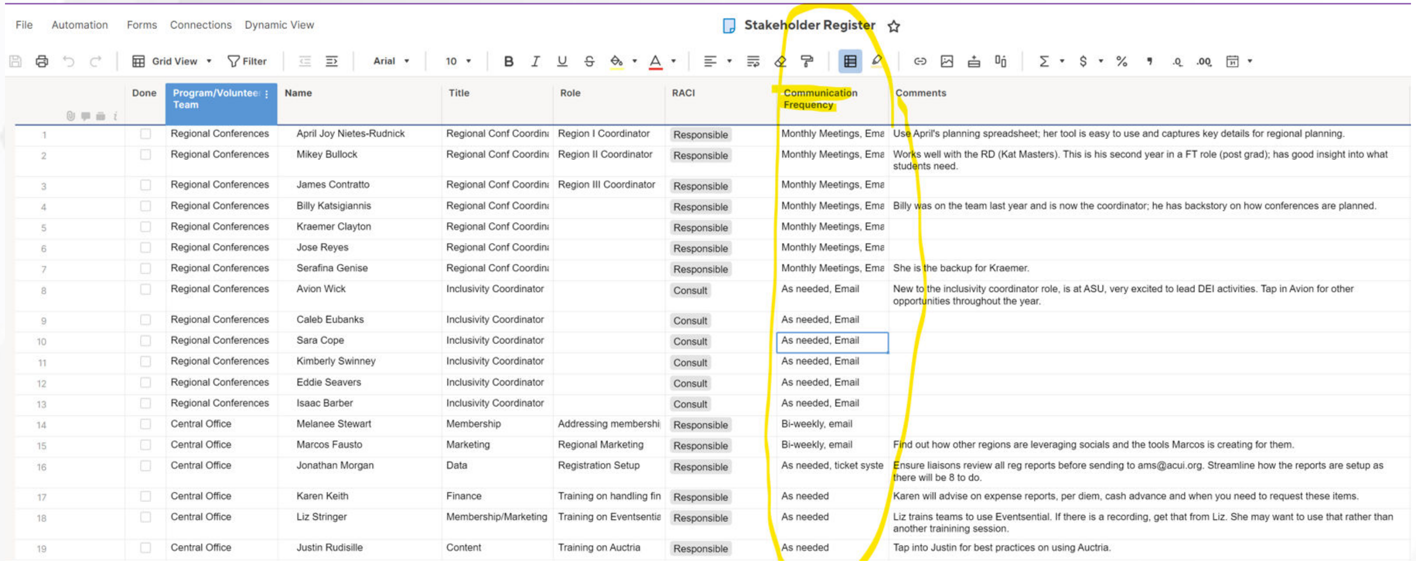


What if you build a skateboard when roller skates were required?

Initiating → Planning → 3 Communication Plan

Real estate is location, location, location.
For projects, it is **communication, communication, communication**!
The PM connects all the stakeholders by keeping everyone informed.

Here is a sample for how to create a communication plan.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Considerations for Communication Plans:

- Will you issue a weekly update every Friday afternoon?
- Will you issue a monthly report on first Monday of new month?
- Do they need to be informed of any changes to scope, cost, risks, or time?

Initiating → Planning → 4 **Risk Assessment**

It is critical to do a formal **Risk Assessment** on your project.
A risk assessment includes:

Identify Risks

1) Registration is lower than expected.
2) The F&B costs exceed your budget.
3) Critical CPT roles are not filled.

Assess Risks

3 x 3 RISK MATRIX

Likelihood	Negligible	Moderate	Severe
Highly Likely	3 MED	HIGH	HIGH
Possible	LOW	MED	2 HIGH 1
Unlikely	LOW	LOW	MED

Impact

Evaluate Risks

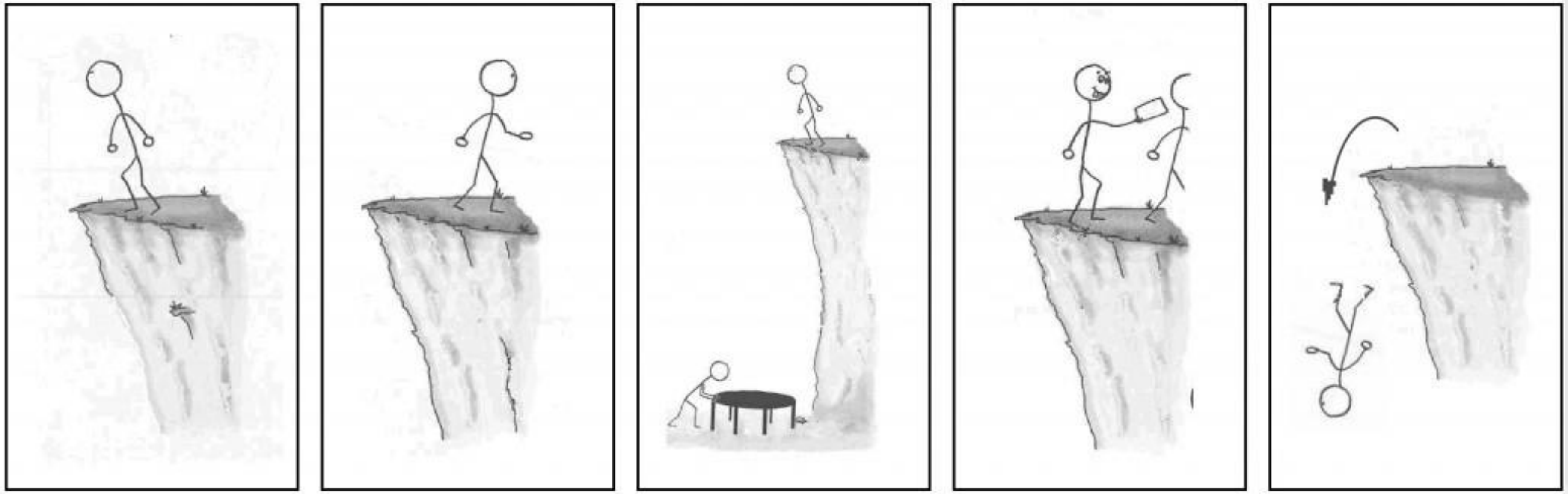
Evaluate → Rank risks and plan a response.

Rank Risks

1) F&B Budget: reduce included meals. Cut costs in other areas.
2) Registration: increase marketing. Use Scenarios in the budget spreadsheet.
3) CPT Roles: Ask team members to play dual roles. CO Liaison to pinch hit.

Initiating → Planning → 4 **Risk Assessment**

With any risk you have 4 choices…



Your project | Avoid | Mitigate | Transfer | Accept

Initiating → Planning → 5 Schedule

Schedule

The **Project Schedule** is one of the ***core day to day PM tools*** in a project.
It outlines:

- ✓ **What work** needs to be done
- ✓ **When** it needs to be done
- ✓ **Who** will do it
- ✓ **Progress** of work vs. Schedule (Status and % Complete)

To build a great project schedule, break work down into **work packages** e.g.

At Risk	Task Name	Status	Assigned To	Start Date	End Date	% Complete	Duration	Predecess...
	NCCI Conference Plan 2024	Complete		10/02/23	07/15/24	35%	206d	
	1. Call for Proposals	Complete		10/02/23	07/05/24	40%	200d	
	1.1 Design			10/02/23	01/26/24	100%	85d	
	1.1.1 Create Call	Complete		10/02/23	10/27/23	100%	20d	
	1.1.2 Advertise	Complete		10/30/23	01/26/24	100%	65d	4
	1.1.3 Design Rubric	Complete		01/02/24	01/19/24	100%	14d	
	1.2 Select			01/25/24	02/19/24		18d	
	1.3 Execute			01/30/24	07/05/24		114d	
	1.3.1 Collect Bio Info	In Progress	AM Amy Morgan	01/30/24	02/27/24		21d	
	1.3.2 Collect PPTs		AM Amy Morgan	05/01/24	07/05/24		48d	
	1.2.1 Review	Complete	A Antonio Nava	02/16/24	02/19/24	100%	2d	
	1.2.2 Select	Complete	A Antonio Nava	02/16/24	02/16/24	100%	1d	
	1.2.3 Notify	Complete	AM Amy Morgan	02/19/24	02/19/24	100%	1d	12
	2. Keynote			12/05/23	07/12/24	38%	159d	
	2.1 Identify			12/05/23	02/20/24	100%	56d	
	2.1.1 Research	Complete	A Antonio Nava	12/05/23	01/09/24	100%	26d	

Initiating → Planning

Let's review:

Initiating → Planning → Executing → Monitoring & Controlling → Closing

		Method	Responsible
1 Scope	Project goal & important info	▪ Scope Template (Charge)	Project Manager
2 Requirements	Detailed project goal	▪ Scope Template (Charge)	Project Manager
3 Communication Plan	**Communicate, communicate, communicate!**	▪ Smartsheet	Project Manager
4 Risk Assessment	Issues become risks. Identify them early.	▪ Scope Template (Charge)	Project Manager
5 Schedule	Sequence the project steps.	▪ Smartsheet	Project Manager
6 Budget	Cost of project.	▪ Budget Template	Project Manager

Initiating → Planning → Executing → 1 Kick Off Meeting

The **Kick Off Meeting** is a chance to get all the team together and some excitement going for the project!

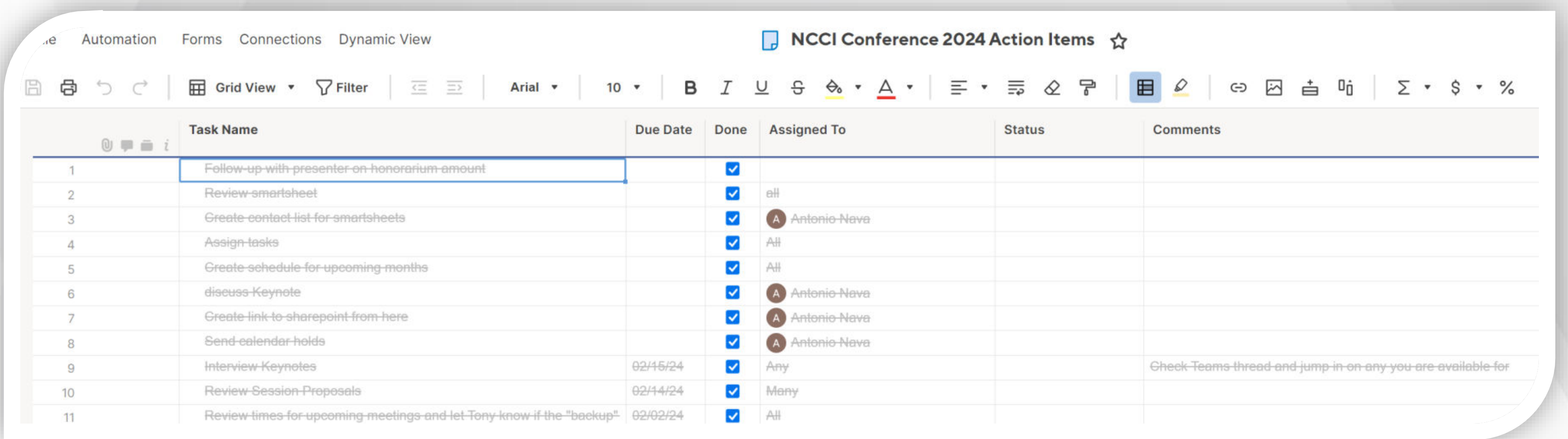
Some tips on leading effective meetings:

1) **Set a clear agenda** (Have a plan & purpose)
   - Review Scope, Schedule etc.
2) Make sure **everyone knows who is in the meeting**
   - Roll call + Introductions
3) Track **action items** during the meeting
   - Clear, concise actions
   - An owner & Due date
4) Update **Meeting Minutes**
   - Use bullet points and be concise.
   - Highlight important points.
   - Write while still fresh in your mind
5) Don't be afraid to **steer the call**!
   - Stay on topic
   - Stay on time

What is (not) in the room (where it happened)?

The **Action Items** are starting to roll in.. How can you keep on top of everything?? Simple... Make a list!

Here is a sample **Action Item List.**



	Task Name	Due Date	Done	Assigned To	Status	Comments
1	~~Follow-up with presenter on honorarium amount~~		☑			
2	~~Review smartsheet~~		☑	~~all~~		
3	~~Create contact list for smartsheets~~		☑	A ~~Antonio Nava~~		
4	~~Assign tasks~~		☑	~~All~~		
5	~~Create schedule for upcoming months~~		☑	~~All~~		
6	~~discuss Keynote~~		☑	A ~~Antonio Nava~~		
7	~~Create link to sharepoint from here~~		☑	A ~~Antonio Nava~~		
8	~~Send calendar holds~~		☑	A ~~Antonio Nava~~		
9	~~Interview Keynotes~~	~~02/15/24~~	☑	~~Any~~		~~Check Teams thread and jump in on any you are available for~~
10	~~Review Session Proposals~~	~~02/14/24~~	☑	~~Many~~		
11	~~Review times for upcoming meetings and let Tony know if the "backup"~~	~~02/02/24~~	☑	~~All~~		

Write clear and concise action items with an owner and due date.

- In meetings pull up your action item list to follow up on action items.
- Include a link to the Action Item List in the meeting minutes.

Initiating → Planning → Executing → ③ **Manage Work**

You ***made*** the plan, now ***do*** the plan!

Use the **Smartsheet** as a working document:

Everyday check:

1) **Project Schedule** – Update it, check tasks are being completed on time!
2) **Action Item List** – Follow up on open action items, check if you have any too!
3) **Risk Register** – Any update to the risks? Have action items been completed?
4) **Track Changes** – Any change requests? Anything that could impact time, cost or scope?

Weekly or as Necessary check:

1) **Stakeholder Register** – Any new stakeholders?
2) **Communication Plan** – Are you constantly getting emails requesting more info? Change the communication plan for that stakeholder.
3) **Budget** – Are you still on track? Do you think we will come under (or over) budget?
4) **Track Changes** – Any change requests? Anything that could impact time, cost or scope?

Initiating → Planning → Executing → 4 **Manage Communication**

You guessed it.. ***Communication, communication, communication!***

It's your job to get the right message, to the right person, at the right time…

Some ideas:

1) Share **Smartsheet*** with the whole team.
   - Update it during your meetings.
   - Direct the team to Smartsheet until it becomes second nature.
2) Use Google Drive
   - Share and edit project documents. Version control.
   - Reduce work "waste" (time lost looking for documents)
   - Eliminate excess email.
3) Utilize **Slack***
   - Internal and external teams have access. Use it for Q&A and updates.
4) Use **Smartsheet Dashboards***
   - If the plan is updated, this is the source of truth for project status.

* Or your tool of choice

Who controls the message?

Initiating → Planning → Executing

To review:

Initiating → Planning → **Executing** → Monitoring & Controlling → Closing

1 Kick Off Meeting

Get everything rolling!

Method	Responsible
▪ Meeting Agenda & Minutes	Project Manager

2 Action Item List

Action, Owner, & Due Date

Method	Responsible
▪ Smartsheet	Project Manager

3 Manage Work

Let's get things done!

Method	Responsible
▪ Smartsheet	Project Manager

4 Manage Communication

Communicate, communicate, communicate!

Method	Responsible
▪ Smartsheet (Dashboard)	Project Manager

In **Monitoring & Controlling** you are checking that your previous assumptions in the project plan are still correct!

Remember the risk management cycle?

You are now measuring those risks and making sure they don't change!

Initiating → Planning → Executing → Monitoring & Controlling → 2 **Change Log**

In **Monitoring & Controlling** one of the most important things you are looking out for is scope creep…

Once the initial scope, time and budget have been approved these are called the **baseline**.

After this point ***all changes*** need to be **properly evaluated** to see if they impact:

Then you have ***2 options***:

1) **Small Change:** Does not impact scope, cost or time.
   - Review with project team, is it really necessary? Do they approve?
2) **Big Change:** It does impact scope, cost or time.
   - Bring the change before the **Project Team/Management Team** and highlight how this change will impact the project.
   - If the leadership approves, then implement the change!

Initiating → Planning → Executing → Monitoring & Controlling → 2 Change Log

How do you manage project changes?

1. Document the change request, who it was from and date.
2. Evaluate the impact on the project
3. If the change impacts the scope, schedule, or budget, this is a risk.
4. Review the change (risk) with the project team/management team to approve/reject.
5. Inform the stakeholders of the decision.

Why are we over budget???

This way you have a **clear record of changes** and can explain why you have spent more time or money than originally planned and agreed!

What happens if you allow scope creep?

Initiating → Planning → Executing → Monitoring & Controlling

Let's review:

Initiating → Planning → Executing → **Monitoring & Controlling** → Closing

1 **Risk Register**

Add, update, or mitigate risks!

Method	Responsible
▪ Project Scope Document (refer to Charter)	Project Manager

2 **Change Log**

Avoid scope creep!

Method	Responsible
▪ Project Scope Document (refer to Charter)	Project Manager

Initiating → Planning → Executing → Monitoring & Controlling → Closing → 1 Closeout Meeting & KISS

You did it!!! The project goal has been completed!

But as a project manager you are not quite finished yet..

First you should hold a closeout meeting and **KISS Analysis**

In the closeout meeting ask the team:

“If we were to do this project again tomorrow, what would we…”

- **K**eep Doing
- **I**mprove
- **S**tart Doing
- **S**top Doing

Initiating → Planning → Executing → Monitoring & Controlling → Closing → 1 Closeout Meeting & KISS

Here is a sample **KISS Analysis.**

? KISS Analysis	
Keep	**Improve**
Weekly Team Meetings	Add more cross functional team members
1 loaction for all project documents	Sign off of Scope document
Change control process	Sending meeting minutes.
Doughnuts at team meetings	
Team action item list	
Start	**Stop**
Issuing weekly quick updates on progress.	Going off topic at meetings
Proper risk analysis at start of project.	

Finish by thanking the team! Celebrate together if possible! Have some doughnuts!

Initiating → Planning → Executing → Monitoring & Controlling → Closing → 2 Closeout Report

Some final tips..

1) **Closeout all your reports**.
2) **Organize your files** (you never know, you might have to do it again!)
3) **Closeout project** (e.g. host lessons learned).
4) **Check all financial loose ends are tied up** (Nexonia, update Budgyt)

Great Job Homer! Since you did so well, there is another project…

Initiating → Planning → Executing → Monitoring & Controlling → Closing

Let's review:

Initiating → Planning → Executing → Monitoring & Controlling → **Closing**

1 **Closeout Meeting & KISS**

Celebrate & Lessons Learned..

Method	Responsible
▪ Document Repository	Project Manager

2 **Closeout Report**

Tidy up!

Method	Responsible
▪ Document Repository	Project Manager