

If We Don't Do It, Who Will?

*Institutional Researchers
as Project Managers
and Change Agents*

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At the end of the presentation, you should be able to answer these questions:

- What is a “project” and what is involved in managing one?
- What are the characteristics of a good project manager?
- Why is IPAR at ECU so often called (and relied) upon to manage projects?
- What are some examples of projects that the presenters have managed? How did they do it?
- What are some experiences of other NC IR professionals with project and/or change management?

According to the Project Management Institute (www.pmi.org),

- A project is “... a **temporary** endeavor undertaken to create a **unique** product, service, or result.”
- Project management is “[t]he **application** of knowledge, skills, tools, and techniques to project activities **to meet project requirements.**”



A project is temporary in that it has a defined beginning and end in time, and therefore defined scope and resources. And a project is unique in that it is not a routine operation, but a specific set of operations designed to accomplish a singular goal. So a project team often includes people who don't usually work together – sometimes from different organizations and across multiple geographies.

Project management, then, is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

It has always been practiced informally, but began to emerge as a distinct profession in the mid-20th century.

PMI's *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)* identifies its recurring elements:

Project management processes fall into five groups:

Initiating

Planning

Executing

Monitoring and Controlling

Closing

10 Characteristics of being a good project manager



Foster good relations

Right time to speak.
Able to handle multiple people.



Anticipate needs

Make sure people
have what is required
to bring out the best.



Focus on solutions

Don't play blame game,
be solution oriented,
solving at hand.



Anticipate problems

Think in 3s, 3 steps,
3 days, 3 weeks into the
future and foresee
problems that might
turn up.



Goes in with a plan

Planning is required for
everything and even if its
not followed, something is
required as a back-up plan.



Inspire

Work in a way
that motivates
those around you.



Delegate firmly

Giving right task to
the right person
Test people's strengths
and let it grow.



Be Driven

Quality results require
quality output.



Minimize meetings

Devote more time to
"doing" and less time
to talking about
"being".

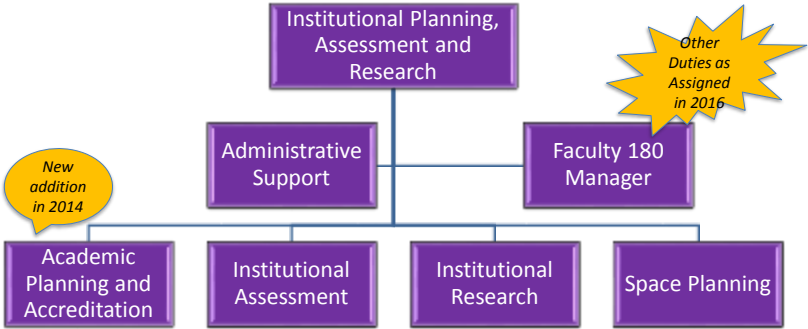


Don't Complain

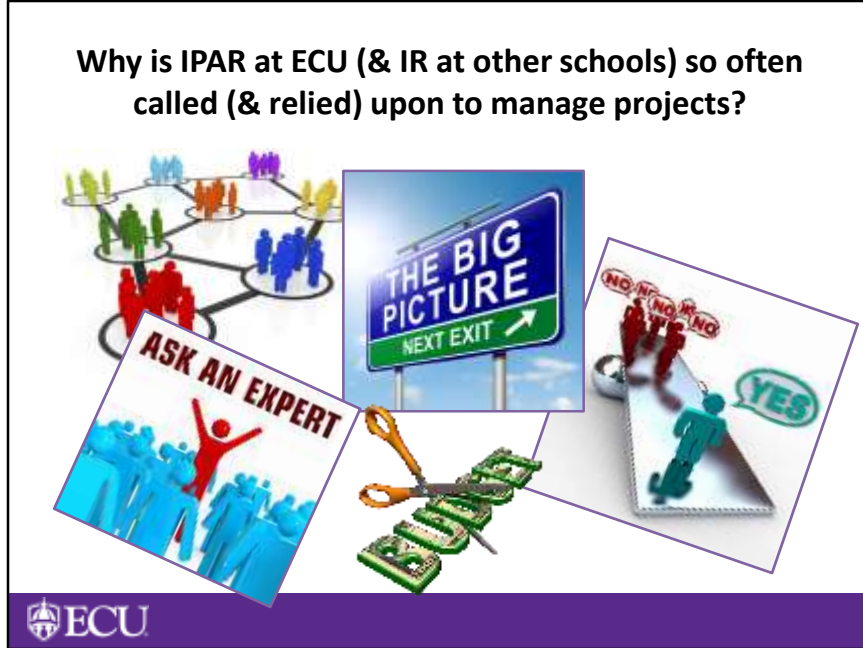
Take lesson from the
past & think positively
in tough situations.



About IPAR



Why is IPAR at ECU (& IR at other schools) so often called (& relied) upon to manage projects?



A number of reasons including:

- (1) Large, decentralized university (even our IT unit, which houses our project management office, is huge with large subunits and consequent division of labor);
- (2) Limited resources, with budget cuts;
- (3) Even though there is a project management office in ITCS, no office handles the totality of project management (and different types of projects);
- (4) IR professionals have expertise in many types of projects (and the attention to detail/organization it takes to manage them);
- (5) Strong shared governance (faculty involvement);
- (6) IR offices have a “bird’s eye” view of their institutions (and they see the big picture);
- (7) Recognition by senior leadership that if they want something done efficiently and effectively, IPAR will do it;
- (8) Focus of senior leadership on the need for data, analytics, etc.;
- (9) Culture of collaboration at ECU;
- (10) Strong customer service attitude in IPAR; usually willing to say “yes.”

And, finally, we are good at overcoming procrastination, a frequent detriment to project success—see next slide

Project Management: IR vs. IT

Tasks	IR	IT
Logistics (scheduling meetings, etc.)	Ad hoc	Trained for
Tracking/Documenting Progress	Ad hoc	Trained for
Procurement Process	Needs guidance	Trained for
Change Management	Facilitate	Not involved
Stakeholder Management (buy in)	In Charge	Not involved
Connecting with Senior Leadership	In Charge	Not usually
Develop Scope/End Goals (Big Picture)	In Charge	Document
Communications	With all stakeholders	Within project team
End Product Ownership	Sometimes	Not usually

“Warning: Dates in a calendar are closer than they appear.” ~ Anonymous



There are number of things that can keep a project from being completed successfully but some argue that the “deadliest” of project management sins is procrastination (<https://pmi.hu/index.php/englishnews/757-the-deadliest-of-project-management-sins-procrastination>)

Other root causes of project failure include (<http://www.projectmanagement.com/pdf/recoverypmtechnique.pdf>):

1. Lack of ownership;
2. Unclear expectations;
3. Unrealistic assumptions;
4. Insufficient data;
5. Lack of resources;
6. Poor planning;
7. Lack of re-planning on a regular basis;
8. Lack of attention to the human and organizational aspects of the project;
9. Turnover in project team; and
10. Weak communication;

We've managed projects of all sizes.
Here are some examples:

Small

- Strategic Plan Metrics
- Faculty Salary Report Revisions
- Program Review Data Package
- [University Ranking Philosophy](#)

Large

- Implementing a new Faculty Activities Reporting System (FACULTY 180)
- Implementing a new Student Evaluation of Instruction survey & tool (BLUE)



Faculty 180 Scope of Work

To replace the old faculty activity reporting system with a new system. Expectations include:

- **Interface:** single sign-on, easy navigation, and clear directions
- **Data integration:** integrating with university data sources; harvesting external publication data sources; feeding to an ECU faculty profile website
- **Flexibility:** customization and flexibility in data entry and reporting; satisfying a variety of faculty activity data reporting needs
- **Personnel evaluation/electronic review:** built-in workflows for annual evaluations, reappointments, and P&T reviews



Primary issue: Trash in, Trash out

Faculty 180 Vision

Cornell University



University of Arizona



Scholars@Duke
Scholars@Cornell
University of Arizona's Faculty Profile

Challenges for Faculty 180 Project: Project Management

- **Scope: large**
 - For all faculty
 - Ambitious goals
 - Marginally related to IR
- **Time: lengthy**
 - 18 months of initiation
 - 3 years of implementation
- **Cost: high**
 - Subscription fee
 - Labor intensive
- **Procurement:**
 - Needs assessment
 - Campus buy-in
- **Integration: complex**
 - Multiple data sources
 - Multiple tech systems
- **Communications: strategic**
 - Coordination across implementation groups
 - Communication to stakeholders



Ying: describe Faculty 180 project concentrating on the PM processes of: Initiating, Planning, Executing, Monitoring/Controlling, and Closing.

Can also address some of the areas involved in project management:

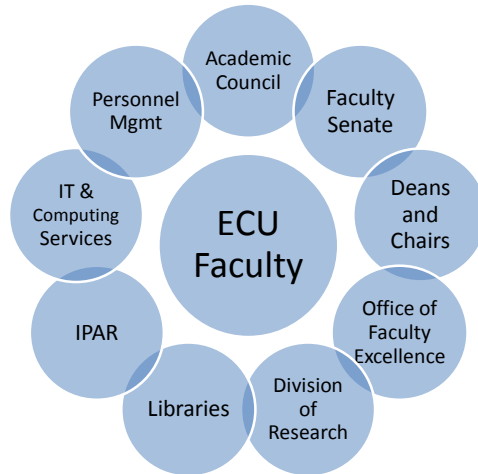
- 1.Integration
- 2.Scope
- 3.Time
- 4.Cost
- 5.Quality
- 6.Procurement
- 7.Human resources
- 8.Communications
- 9.Risk management
- 10.Stakeholder management

Challenges for Faculty 180 Project: Change Management

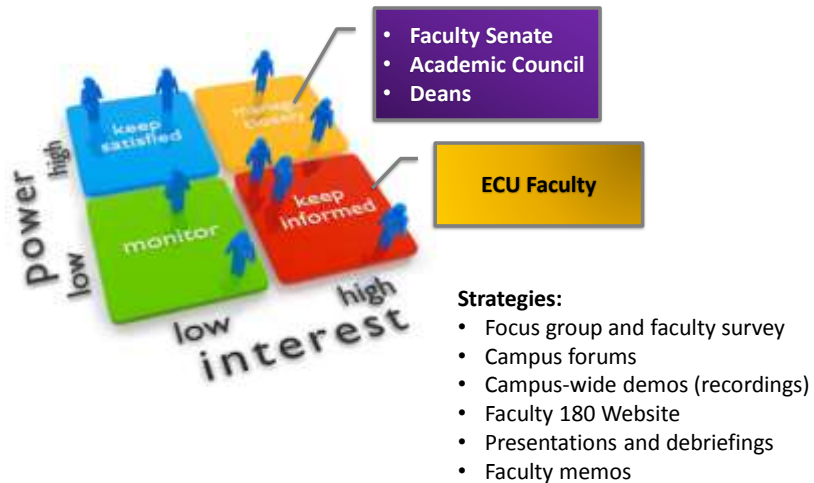
- **Human Behaviors:**
 - Adopting a new technology
 - Adopting an electronic process
 - Changing existing practices
- **Risk Management:**
 - Risk factors constantly reviewed
- **Product Enhancement:**
 - Happening all the time, from internal and external
- **Quality:**
 - Improving data quality
 - Improving reporting accuracy



Faculty 180 Stakeholders



Stakeholder Management



FACULTY180

Faculty180: Faculty Reporting System



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Welcome to the Faculty180 Information Portal

ECU has selected Faculty180 as the centrally-into actively reporting system. After reviewing products and conducting several and focus groups across the campus, a committee of faculty, staff and administrators determined that Faculty180 best meets our collective reporting needs.

This site provides information about the Faculty180 project including the roles of committee members, progress of implementation, links to resources and more and announcements.

• [Find self-help resources](#) on the Faculty180 SharePoint site.

About Faculty180

Faculty180 is a tool for reporting activities of faculty, departments, colleges and the university as a whole. Faculty180 will facilitate tenure and promotion and annual performance review processes.

Faculty180 was chosen because its interface and system features will make collecting and reviewing information and improving evaluation procedures more effective. Below:

Announcements

Faculty180 get a handle! Visit the SharePoint site, contact your college Super User, or email faculty180@ecu.edu with questions.

If you are having problems logging in, check your browser session and clear your cookies and cache. [More info.](#)

What Do I Need to Do Right Now?

1. DO review and update your Faculty180 profile and activate Log In
2. DO update your directory information in Banner Self Service Applications
3. DO access self-help resources and other information through the SharePoint site
4. DO contact your college coordinator to arrange any

Faculty 180 Project Timeline

Initiation: Spring 2015

- Exploring Products; Defining Scope; Identifying Resources

Planning/Procurement: 2015-16

- Assessing Needs; Evaluating Products; Gaining Buy-in

System Configuration & Data Migration: 2016-17

- Mapping Data; Standardizing Categories of Activities

Deployment: 2017-18

- Testing, Trouble-shooting, Adjusting, and Training

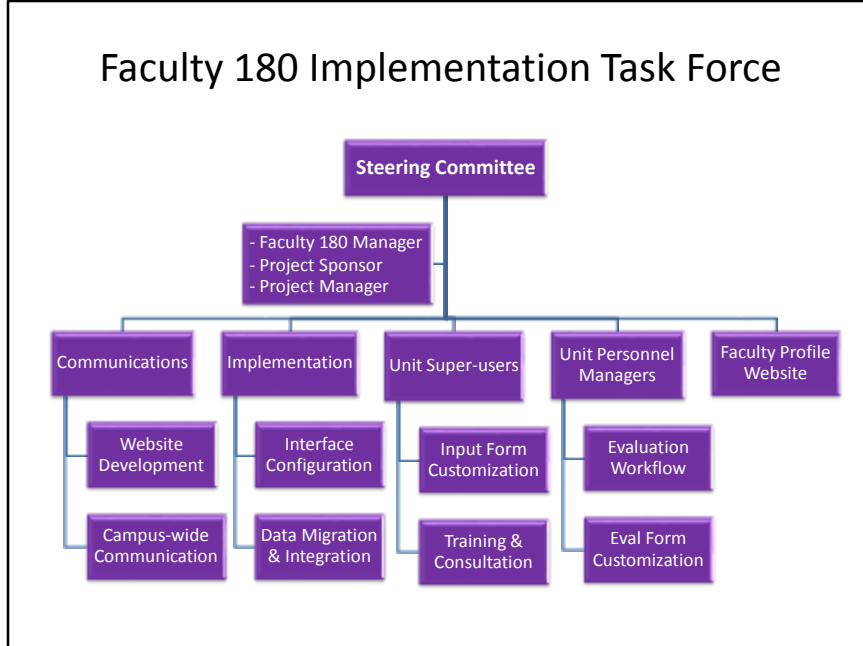
Faculty Website & Evaluation Workflows: 2018-19

A typical project management cycle includes 5 stages:

- Initiating: **the project we were interested during the initiation stage is NOT the project we ended up buying**
- Planning
- Executing
- Monitoring and Controlling
- Closing

Planning and Re-Planning: deadlines are critical

Faculty 180 Implementation Task Force



Chair and 3 co-chairs

1. Chair, the steering committee
2. Co-chairs: from ITCS, one faculty senate officer, one is a faculty member from the Libraries who later was appointed as the Faculty 180 manager

The Good

Faculty 180 is more robust than ECU's previous system. It has the capability to:

- harvest publication data from external sources
- upload pre-populated journal, conference, and committee lists
- integrate with Banner and other ECU data sources, which reduces data input burdens on faculty while ensuring better quality of data
- create activity classifications to meet reporting needs
- identify duplicate entries and deploy data visualization
- customize workflows for personnel evaluations



The Bad

Implementation process is more complex and time-consuming than originally anticipated.



- Lack of documentation from Faculty180 was a major roadblock.
- Company merge and staff turnover delayed the implementation.
- Migration of legacy data was painful and labor-intensive
 - Faculty 180 under-estimated the complexity of ECU data and the need for data transformation during migration
 - ECU super-users and staff contributed many hours to investigating our data across units, consolidating categories of activities, and creating standard definitions of activity types and classifications
- Data pulled from Banner and other ECU systems have errors.
- Across-institution decision rules (e.g., activity classification) are not always possible.

Lessons Learned

- Campus-wide participation and collaboration is critical and can be achieved through multiple means.
- It is essential to maintain effective communication at all stages of the process and across all stakeholders.
- Do due diligence in data validation and integrations.
- Document definitions, business processes, and major decisions.
- Take the time to nurture a long-term, collaborative relationship with the vendor.

Plan and Re-plan



the project we were interested during the initiation stage is NOT the project we ended up buying

Recommendations to IR Professionals

1. Take time to understand expectations and needs, and nail down project details.
2. Identify stakeholders and assemble an effective team.
3. Define critical milestones and set firm deadlines.
4. Develop and implement a communications plan.
5. Keep good documentation.
6. Be prepared for the unexpected and be flexible.



When you
lead a project,

- Cultivate teamwork
- Provide directions
- Keep the traffic moving

**What are some of your experiences
with project & change management?**

