
If We Don't Do It, Who Will?
Institutional Researchers
as Project Managers
and Change Agents
NCAIR Conference 2018
Beverly King & Ying Zhou,
Institutional Planning,
Assessment, & Research
ECU

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?

ECU

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***."

ECU

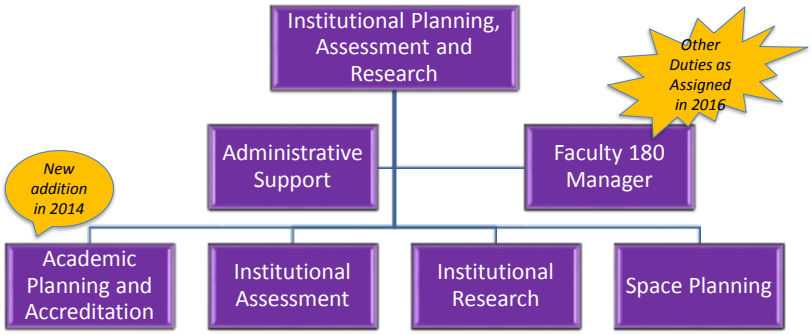
A project is temporary in that it has a defined beginning and end in time, and therefore defined scope and resources. And a project is unique in that it is not a routine operation, but a specific set of operations designed to accomplish a singular goal. So a project team often includes people who don't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

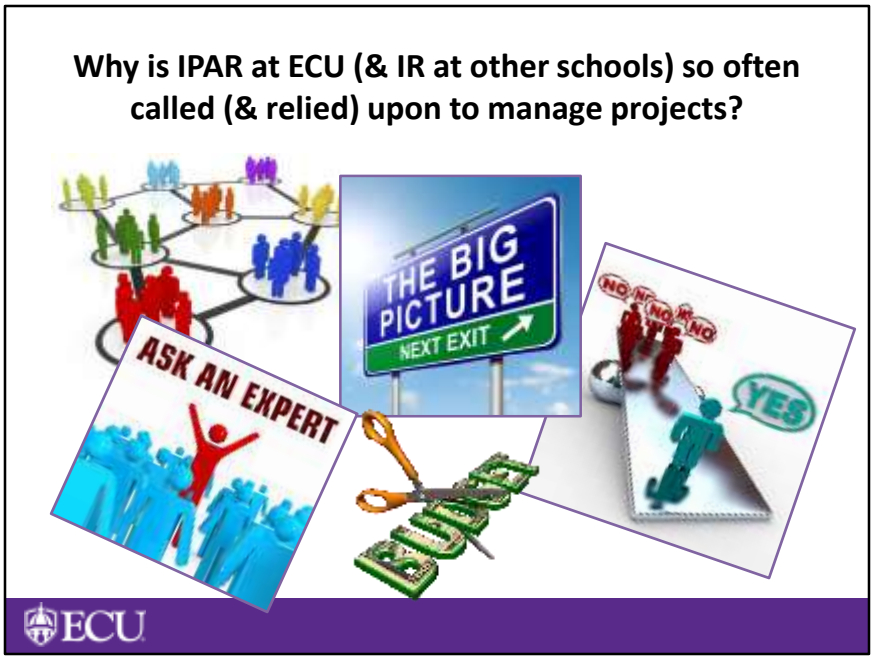
Project management, then, is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.
It has always been practiced informally, but began to emerge as a distinct profession in the mid-20th century.

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.
Goes in with a plan
Planning is required for everything and even if its not followed, something is required as a back-up plan.
Focus on solutions
Dont play blame game, be solution oriented, solving at hand.
Anticipate problems
Think in 10,1 steps, 3 days,3 weeks into the future and foresee problems that might turn up.
Inspire
Work in a way, that motivates those around you.
Delegate firmly
Giving right task to the right person
Test poolpa'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 "Doing".
Dont Complain
Take lesson from the past & think positively in tough situations.
Manager
ECU

About IPAR


Institutional Planning, Assessment and Research
Other Duties as Assigned in 2016
Administrative Support
Faculty 180 Manager
New addition in 2014
Academic Planning and Accreditation
Institutional Assessment
Institutional Research
Space Planning



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

ECU

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

ECU

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:

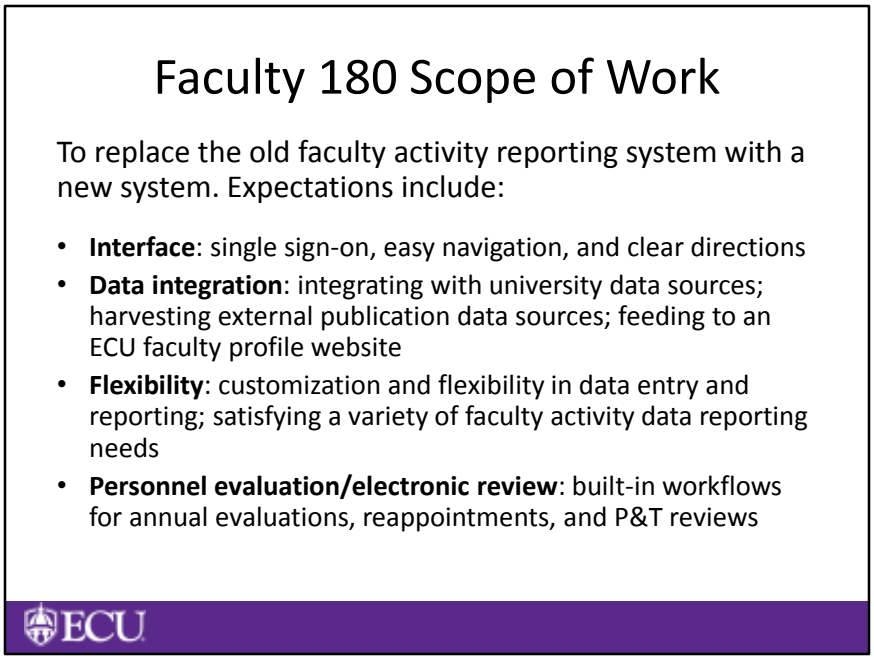
Small

- 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)

ECU



Primary issue: Trash in, Trash out

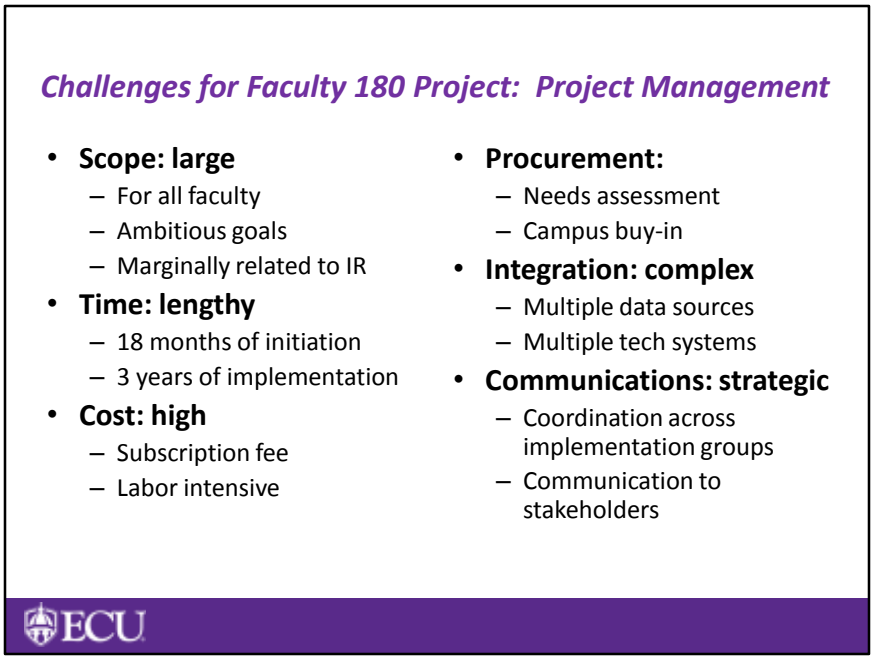
Faculty 180 Vision

Cornell University

University of Arizona

ECU

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



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

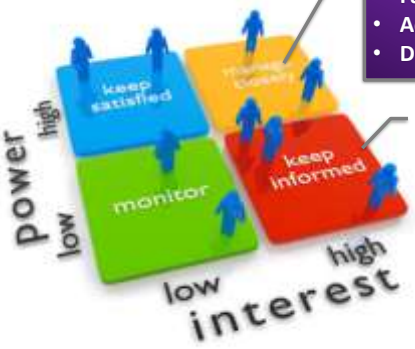
Challenges for Faculty 180 Project: Change Management

- **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

ECU

Faculty 180 Stakeholders

Stakeholder Management



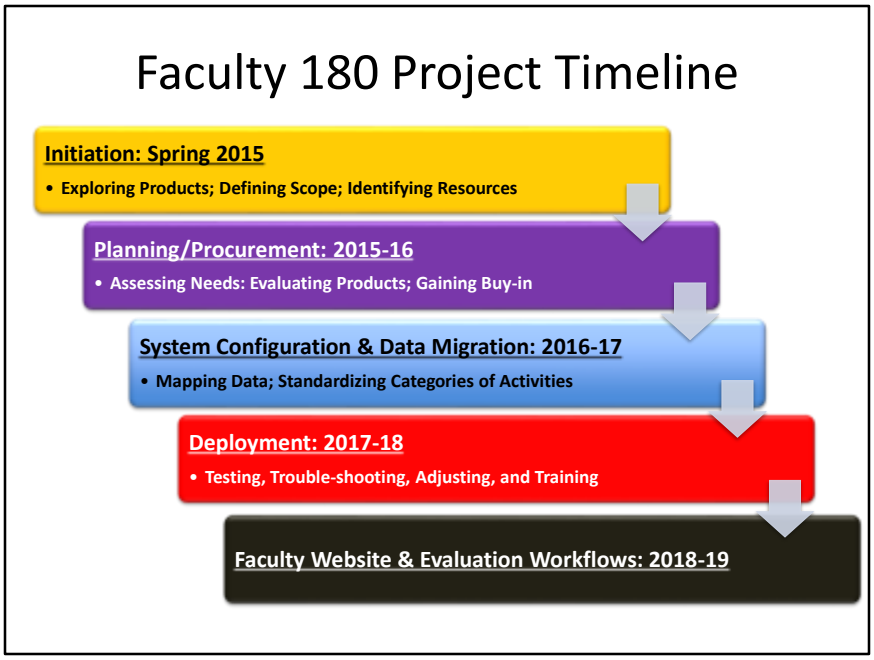
- **Faculty Senate**
- **Academic Council**
- **Deans**

ECU Faculty

Strategies:

- Focus group and faculty survey
- Campus forums
- Campus-wide demos (recordings)
- Faculty 180 Website
- Presentations and debriefings
- Faculty memos

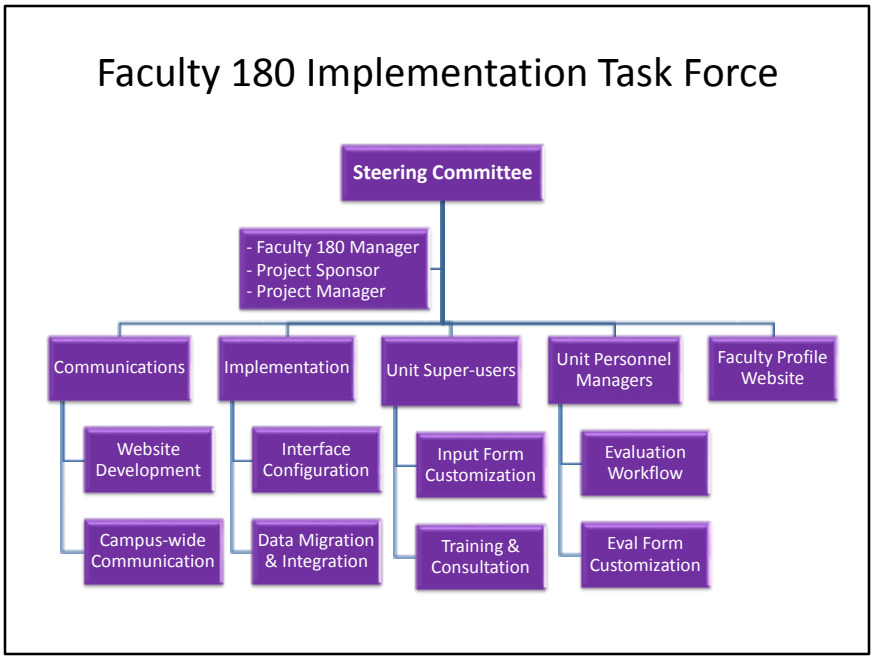

FACULTY180
Faculty180: Faculty Reporting System
Welcome to the Faculty180 Information Portal
Announcements
About Faculty180
What Do I Need to Do Right Now?



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



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

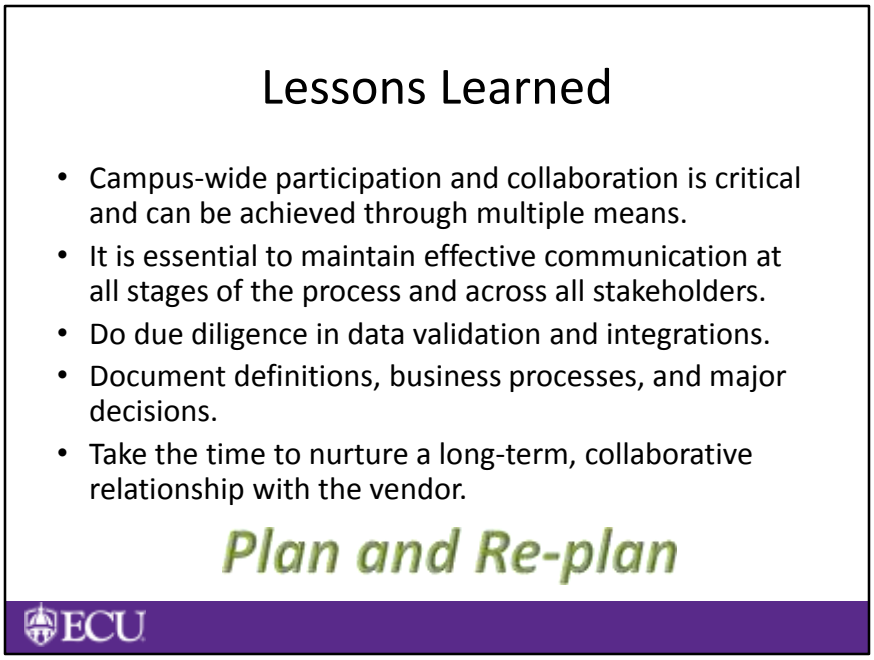
ECU

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.

ECU



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

Recommendations to IR Professionals

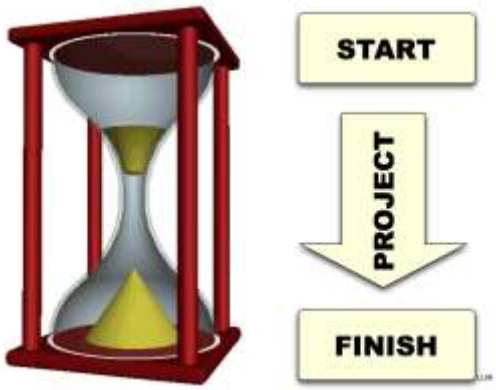
1. Take time to understand expectations and needs, and nail down project details.
2. Identify stakeholders and assemble an effective team.
3. Define critical milestones and set firm deadlines.
4. Develop and implement a communications plan.
5. Keep good documentation.
6. Be prepared for the unexpected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

ECU

When you lead a project,

- Cultivate teamwork
- Provide directions
- Keep the traffic moving

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



ECU