

# Project Management – WIND Integration Recommendations - Updated 9-29-08

## ***FY2008 Accomplishment***

1. Review of WIND software and making changes so that modules better fit our organization and emerging project management standardized process
2. Fine tuning previous Project Management processes and templates to a streamlined approach that is simple to execute and read. (See attached packet for \$5M List example)
3. Continued review and refinement of policies and clarifying responsibilities between departments to minimize duplication of effort and miscommunication on projects.
4. Provided PM coaching to DES Project Managers to expedite their application of the standardized project management processes
5. Collected checklists that assure work on projects are done correctly and decided the need to develop standardized checklists in FY09

## ***FY 2009 Recommendations & Status***

Navajo Nation has done needs analysis in their previous work with PWT. Strategic plans were based on information provided by this analysis. A common goal in CIO, DES and CDBG is to standardize processes surrounding the delivery of construction related processes. Project management is a component of this standardization process, but standardizing project authorization and roles is key to the success of any project management initiatives. After continuing work with our Project Management Coach the following recommendations were identified and carried forward from FY2008:

<b>Recommendation</b>	<b>Status as of 9-29-08</b>
<p>1. Based on FY2008 work (See last page), group needs to adopt measures to integrate efforts. Issues require multiple efforts from different areas and implementation of WIND system</p>	<p>Target measures are suggested below, group needs to review while updating strategic plan. Sr. Management needs to approve targets and monitor progress quarterly</p> <p>Need to continue to evaluate DES’s role as Product Manager. Should DES be in the role of “inspecting” their own work?</p> <p>In our efforts on \$5M Appropriations list DES Project Managers could not provide key names for the role of Sponsor &amp; Customer. Management needs to be more involved in this process.</p>
<p>2. Forecasting a schedule and accounting for delays is key to understanding the sources of delays and overspending on projects. The scheduling during the Execution Phase (Pre-Design, Design, Construction) is complex with multiple dependencies. The PM’s need to utilize MS Project to efficiently forecast schedules and compare “actuals” on projects.</p> <p>All project managers responsible for Planning phase should plan to do their high level scheduling in MS</p>	<p>Need to request MS Project for all PM’s in DES. Currently our PM Coach performs this service for the group. The group needs to learn how to use standardized schedule template to forecast and update a project. (This is a carry over from FY2008)</p>

Recommendation	Status as of 9-29-08
Excel	
<p>3. Take advantage of WIND roll out to form a foundation of standardization. Roles between departments and responsibility of chapters and project managers clarified during WIND training. Standardization in the form of checklist should be introduced to standardize work required before data is represented in WIND system. This approach will ensure accuracy and consistency of the data in the WIND System.</p>	<p>See PM-WIND Integration Plan &amp; Roll out Calendar. This document shows who will be performing the work and how the information will be reflected in the WIND system The PM-WIND Integration Plan defines all key documents produced in each phase and clarifies who is responsible. Developing these and loading into WIND will provide a start to address our Records Management issues.</p>
<p>4. Standardize Status reporting on projects using a standard status report format and face-to-face meeting with PM, Program Manager &amp; Sr. Program/ Project Specialist. Need to include reasons for delays and variances in budget (under &amp; over). Also need to include a summary of change orders on a project and was is the source of the change,</p>	<p>Update status report developed during FY2008. Need to come up with pre-defined work that must be done in order to report a certain percentage complete on a project. Additionally, need to add a change order summary section (Time, Cost &amp; Materials)</p> <p>The status report on projects needs to be redesigned to minimize duplication and focus on last month's accomplishments and next month's accomplishments.</p> <p>PM's need to start a 1 day/ month project reviews. Our PM coach will facilitate until DES identifies a resources that can conduct reviews and updates of projects. All reports on a project will use the information in this documentation. This process will reduce the number of requests for information requests to PM's during project. An assigned admin will take info from reviews and update WIND.</p>
<p>5. Rename Project Tracking Module to Project Administration as it is only focused on administrative tasks related to awarding contracts and paying invoices from the vendor. The area called Project Docs can be an area where project documents (Schedule, assumptions, constraints, &amp; meeting minutes) can be uploaded. Using this as a central location should assist with communication</p>	<p>Completed – The Project Tracking Module has been changed to Project Administration.</p> <p>TO DO: The Project docs area of this module is key to standardizing the documents and their location. A naming convention needs to be defined</p>
<p>6. Identify who will enter the info and who will be responsible for its update. This area is blurry and attached a table that should be used to clarify roles prior to WIND roll out.</p>	<p>See PM-WIND Integration Plan &amp; Roll out Calendar. This document shows who will be performing the work and how the information will be reflected in the WIND system Also see FY2009 Target Measures. If organization can adopt these measures this will clarify who is responsible for improvements</p>
<p>7. Adopt yearly measures to encourage organization to move towards standardized project management. The table below serves as the type of measures the organization needs to adopt as</p>	<p>See Target Measures. These types of measures need to be reviewed and incorporated into strategic plan written by PWT</p>

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part of their strategic planning process (to be done yearly).	
8. Write a 6 month roll out plan for WIND and what is expected for each month. Last page is an example of how to lay out this plan.	See PM-WIND Integration Plan & Roll out Calendar. This document shows who will be performing the work and how the information will be reflected in the WIND system

## FY 2009 Target Measures and Status – Example Needs Review and Approval

Area	Target Measure (By end of FY09)	Owner	Status as of 9-29-08
Program Management – Developing a foundation for project success	75% of projects authorized for implementation are implemented in the fiscal year they are forecasted	CIO – Casey Begay	July 2008 – Waiting for WIND system to help standardize handoff from CIO to DES for implementation
Program Management – Leveraging resources to perform work	75% of dollars allocated to execute projects are spent in the designated fiscal year	DES – Fred Marianito	July 2008 – Supporting WIND development so that areas of concern relating to implementation can be identified earlier and resources can be allocated longer range. Additionally identifying projects that are not adequately funded
Project Management – Monitoring & Controlling	100% of projects on \$5M, \$10M, \$12.7M Lists have standard schedules with associated spending plans	DES – Scott House	June 2008: PM Coach initiated prototype using Project Template & Standardized Schedule. 7 of 20 projects on \$5M List were completed. Sept 2008 – Prototype is ready to be converted to standard process for DES group. Need to start working on other lists and set up standard day for PM Coaching with DES PM's.
Project Management – Standardization	Preplanning and Planning process checklists are defined and followed on 75% of projects	CIO – Casey Begay	July 2008 – Scott House collected existing checklists and is working on prototype examples to review with Casey
Project Management Standardization -	50% of active projects have risks identified to account for variances reported in standardized reporting	DES – Scott House	July 2008 – PM Coach suggested monthly individual project assessment meetings with Sr. Proj Specialist (Scott House) & Program Manager to update schedules and log risks. Scott is working to get this scheduled starting in September
Product Management – Standardization	100% of change orders (time, cost & materials) are tracked and categorized (So that for next fiscal year, areas	DES – Fred Marianito	July 2008 – All change orders are processed using a standardized format. Scott House is evaluating including information on Project Status report

Area	Target Measure (By end of FY09)	Owner	Status as of 9-29-08
	for improvement can be identified)		
Project Management – Individual Development	50% of staff identified to fulfill project manager role have taken an introduction to project management course that are registered with PMI (Project Management Institute) concepts	DES – Fred Marianito, Arbin Mitchell	July 2008 – Scott to review with managers that UNM CE has these courses available. On line courses through UNM CE are also available. On site courses are difficult to schedule and are not cost effective. Most of the current project managers introductory training. Scott to request the staff development office to set up training matrix and update quarterly.
Project Management – Individual Development	10% of Project Managers/ Regional Managers take courses to prepare for PMP certification	DES – Fred Marianito	July 2008 – Scott to review with Fred and identify staff interested in focusing on project management. For this staff the path to PMP certification should be outlined in their IDP