Project Management Foundations

UW System's Project Management Office has assembled project management and change management resources to help you effectively lead projects. You may be serving a dual role – managing the project and also the implementing the project. You may be the sole project team member or have a project team working on different aspects of your project.

This guide will help you understand the basics of project management and resources to help you succeed in leading your project on schedule, on budget, and aligned with the project goals. We have provided links to several templates you can use or customize to meet your project management needs.

PROJECT MANAGEMENT BASICS

A **project** is a temporary endeavor undertaken to create a unique product, service, or result. It has a defined beginning and end time, and defined scope and resources. Every project has these components:

- Goal: What are you trying to achieve?
- Timeline: When are you trying to achieve it by?
- Budget: How much will it cost to achieve?
- Stakeholders: Who are the major players that have an interest in this project, from department leaders to those affected by a change?
- Project manager: Who is going to make sure everything that needs to be completed gets completed?

Project management is the leadership of identifying the problem, creating a plan to solve the problem, and then executing on that plan until the problem has been solved going through the **project lifecycle** stages of Initiation, Planning, Execution, and Closeout.

Project management will help your organization:

- Have a more predictable project planning and execution process
- Adhere to project budgets, schedules, and scope guidelines
- Identify and plan for risks
- Resolve project roadblocks and escalate issues quicker and more easily
- Improve collaboration across and within teams

As a **project manager** or **project lead**, you are responsible for the planning, executing, monitoring, controlling, and completion of projects. Here are a few of the main project management responsibilities that you may have:

- **Build the plan**: Plot out the most realistic course for the project, including the project scope, timeline, and budget.

- **Assemble the project team**: Identify the team members based on the scope of the initiative and the functions needed to complete the project.
- **Assign tasks**: Provide clear definition of specific tasks and timelines for every part of the project.
- **Lead the team**: Check in for status updates, identify and clear roadblocks, negotiate disagreements, keep team morale high, and provide training and mentoring.
- **Manage budget:** Manage costs of the project and adjust if necessary.
- **Manage timelines**: Keep everything on schedule so everyone meets deadlines. Set realistic deadlines throughout the lifecycle of the project, communicating consistently with the team for status updates, and maintaining a detailed schedule.
- **Engage stakeholders**: Stakeholders are typically people who are affected by the project or people who lead the department or office which oversees this project.
- **Document progress and results**: Document the progress of the project to report to those who need to know the status of the project.

THE PROJECT LIFECYCLE

INITIATION
Define the project and authorize the work.

Project Charter. During project initiation, it is important to agree on what product, service, or result is being created and when it will be completed. A **Project Charter** is useful to document the project definition and a shared understanding of the project goals, constraints, and governance. The Project Charter defines the scope of the work, identifies stakeholders and project team members, states the requirements that must be met for successful project completion, and formally authorizes the project.

During initiation, you may have to assemble a project team of subject matter experts and people with a vested interest in the project. Clearly define the roles and responsibilities of project team members, particularly how they will be expected to dedicate time to the project. Make sure that team members are authorized to participate in the project. When the project team is assembled, agree on team logistics like frequency of meetings or updates, who is authorized to make what decisions, and when the project lead will consult with the sponsor.

PLANNING
Document the steps and processes to complete the project.

Project Schedule. Planning includes determining what activities must occur to complete the project, the order in which the activities will occur, who will perform them, and how long they will take. This information can be tracked in a **Project Schedule** along with milestones – major events or deliverables – to ensure timely progress. In the Project Schedule, establish clear objectives and be realistic with deadlines.

Risk, Issues, and Decisions. During the planning phase, it is also advisable to adopt a framework for monitoring project risks, issues, and decisions. A risk is something that might happen and that would impact the project if it does. By identifying risks in advance, the project team can adopt strategies to prevent them from occurring or take action to decrease any negative impact if they do occur. An issue is something that has happened and that has impacted the project. A **Risks, Issues, and Decisions Log** can help you track risks and issues as well as decisions that pertain to the project.

Budgeting. Project planning can include preparing a project budget and a method for tracking costs. A simple **Budget Tracking Worksheet** can help you get started. The project sponsor authorizes funding and should be closely involved with budget development. Keep in mind that a project may require substantial staff time that will be taken away from other work, along with direct costs like equipment or contractors. Also remember that because a project has an established start and date, ongoing expenses should be factored into an operational budget rather than the project budget.

Change Management. Change management is a process that a project leader may use to ensure individuals successfully transition with changes brought on by a project. Change management will help you assess the scope of change, develop messaging about the change, and decide how you go about communicating the change. Refer to the **Leading Change Management** document for a closer look at elements and steps in managing and communicating change.

Communication Plan. Project communication involves multiple layers of people that require different information at different frequency intervals. Develop a **Project Communications Plan** to document what audience will receive what updates and when. Establish feedback channels that allow stakeholders to provide input and respond to that input. Consider what matters to the stakeholders ("what's in it for me"), how and when they prefer to receive information, and what training they need.

Stakeholder Profile. You need to know who will be impacted by the project, what change they will experience, what they need to know about the change, and level of acceptance or resistance in planning your engagement. Use the **Project Stakeholder Profile** to list the audiences affected by the project, the change they will experience, and what they need to know.

Communication Timeline. Carrying out engagement with your audiences may be simple face-to-face touchpoints or ongoing and varied connection based on the complexity of the project. Use the **Project Communication Timeline** to create a detailed timeline of the communication and engagement activities of the project.

EXECUTION
Perform the work and monitor the project.

During execution, the project team performs the tasks and activities to complete the project. Use the Project Schedule and other resources developed in the planning phase to track progress and adjust where necessary. Adjustments to the project timeline, budget, or scope should be discussed with the project sponsor. Regularly prepare a **Project Status Report** to ensure that the sponsor stays informed and can assist with problems.

CLOSEOUT
Bring the project to an end.

Bring the project to its conclusion by evaluating and formalizing acceptance of project results. Use a **Project Closeout Report** to confirm that the Project Charter's requirements and expectations have been met. It is also advisable to document **Lessons Learned** for the benefit of future projects. Conduct a closeout meeting or event for the project team to celebrate the team's work and successful completion of the project.

PROJECT TEMPLATES

Document	Description
Project Charter	Document that outlines the project, provides a shared understanding of project goals, constraints, and governance, states the requirements, and formally authorizes the project.
Project Schedule	List of activities must occur to complete the project, the order in which the activities will occur, who will perform them, and how long they will take.
Project Communications Plan	Document used as a guide for change communication throughout the project, focusing on communications with stakeholders and audiences outside the project team.
Project Stakeholder Profile	Worksheet to list detailed information on the audiences who will be affected by the project, what change they will experience, what they need to know, and level of acceptance/resistance.
Project Communication Timeline	Worksheet to create a detailed timeline of the communication and engagement activities of the project.
Risks and Decisions Log	Worksheet to document and monitor project risks, issues, and decisions.
Budget Tracking Worksheet	Worksheet to document and monitor project expenses.
Project Status Report	Report submitted to the Project Sponsor to track project status, needs, issues, risks, and milestones.
Project Closeout Report	Document that evaluates the completion of project goals, milestones and deliverables and denotes the transfer of ongoing responsibilities to the business owner.
Lessons Learned	Document submitted at the end of a project to describe what went well and what went poorly in the project.