



Icebreaker

Welcome to *How to Become a Rock Star Project Manager!*

While we wait for everyone to join, please share in the chat:

- ✓ Your name
- ✓ Your organization
- ✓ “Yes” or “No”: In your role as it relates to your CSP grant, is project manager one of the hats you wear?



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How to Become a Rock Star Project Manager

2021 Charter School Programs Project Directors' Meeting

February 23, 2021 | Virtual Presentation



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Speakers



Karen Dorsey Hargrove
Program Support & External
Affairs, CSP, OESE



Carter Clawson, MSW, PMP
National Charter School
Resource Center



Our Learning Objectives



Participants will understand the seven components of successful project management for executing a CSP grant.



Participants will be able to apply key practices for more effective project management.



Session Key



Key Questions to Ask



Key Practices



CSP Tip

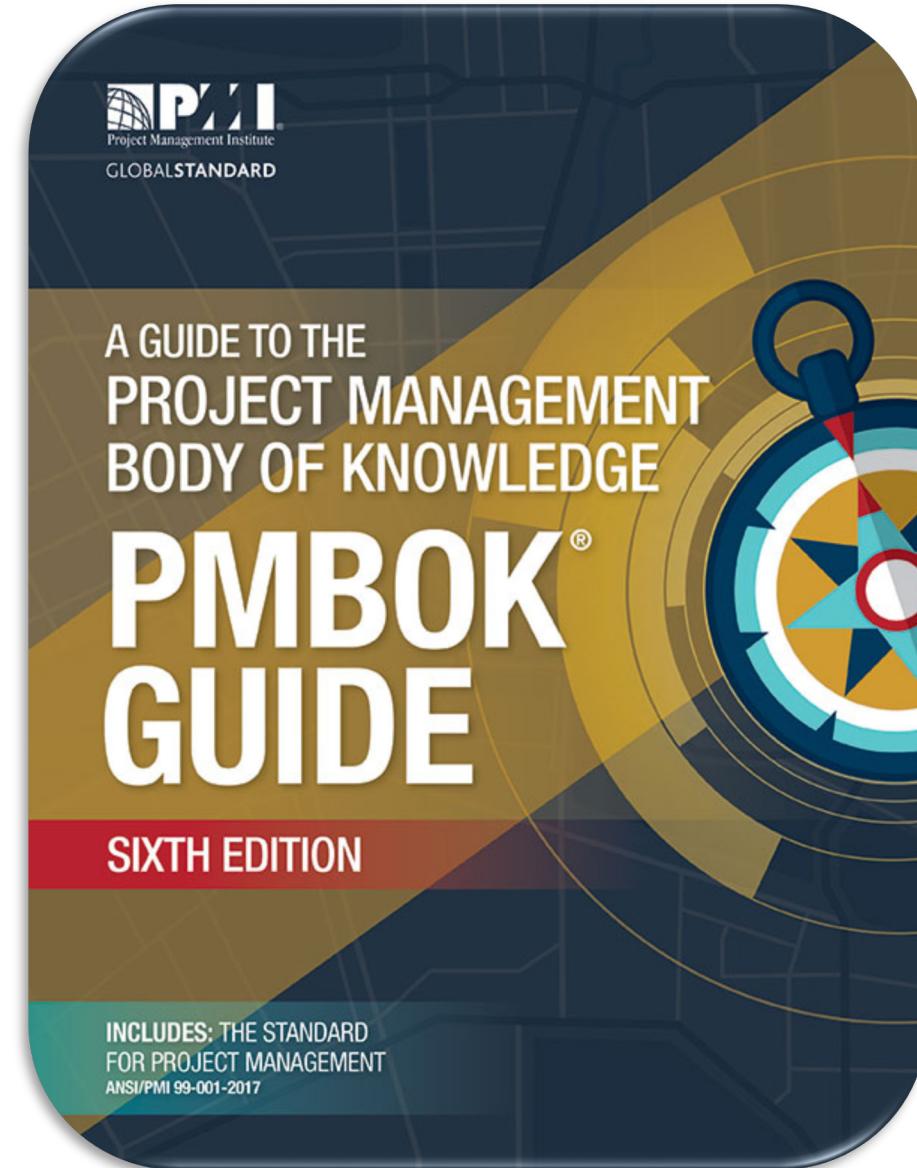


Chime in the Chat



Today's workshop is based on...

- The Project Management Institute Standards and the *Project Management Body of Knowledge Guide*
- [ED's Discretionary Grants Course](#)



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Those who plan do better
than those who do not
plan, even though they
rarely stick to their plan.



The 7 Major Components of Successful Project Management

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The 7 Major Components of Every Project



Scope



Schedule



Budget



Quality



Human Resources



Communications



Risk

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#1

Scope



Scope: Key Question to Ask

What is the work your team must do to achieve your grant goals, objectives, and outcomes?





Defining Scope

Scope in Project Management

- **What it is:** All the required work and only the required work necessary to complete the project.
- **What it looks like:** A concise summary of your deliverables on the project and how you will go about your work.
- **How you use it:** All team members and stakeholders should know your scope to avoid misunderstandings and scope creep.

Scope in Grant Management

- **What it is:** All the approved objectives, the approach/methodology, and the timeline related to your grant.
- **What it looks like:** Your scope is what's in your approved application narrative, along with any approved modifications.
- **How you use it:** Your team builds the project based on your grant scope. CSP reviews APRs in part to confirm that grantees remain within scope.



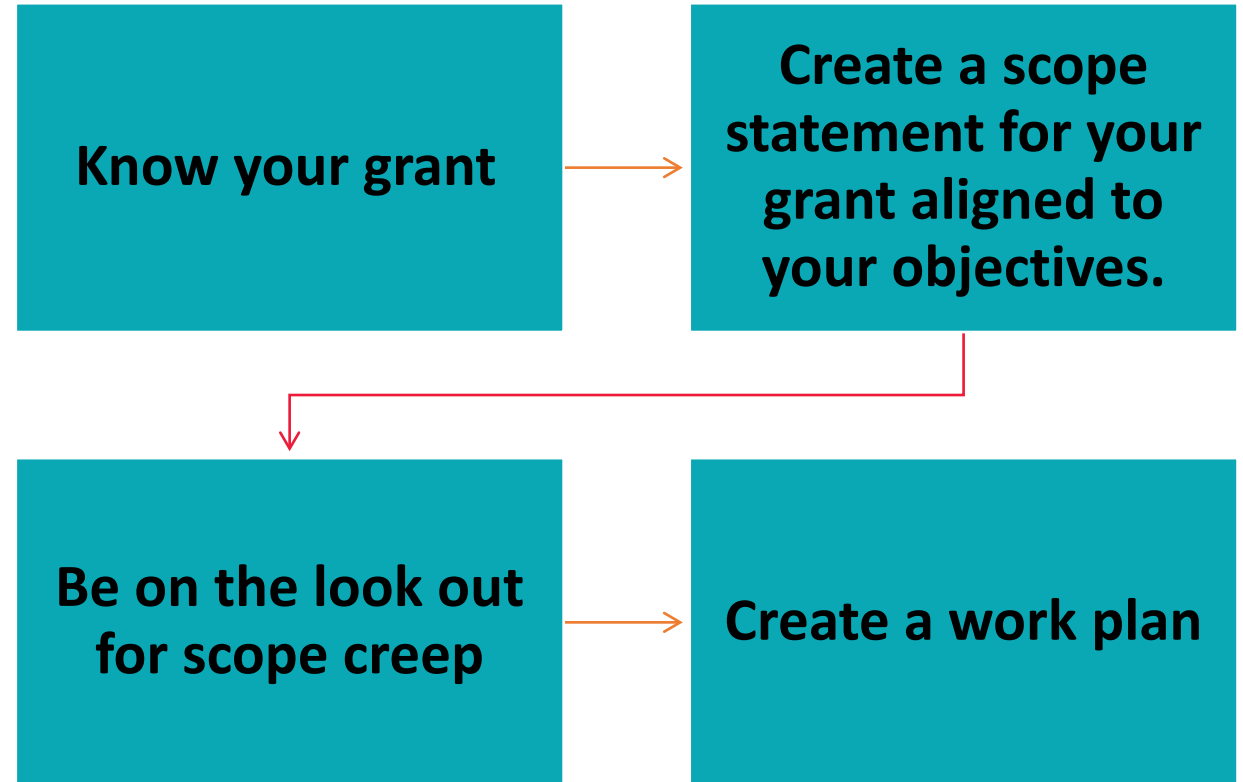
Scope: CSP Tip

A change in project scope requires prior Program Officer approval, as do changes to your objectives.





Scope: Key Practices





Poll #1

Do you have and regularly update a work plan to manage your grant scope?

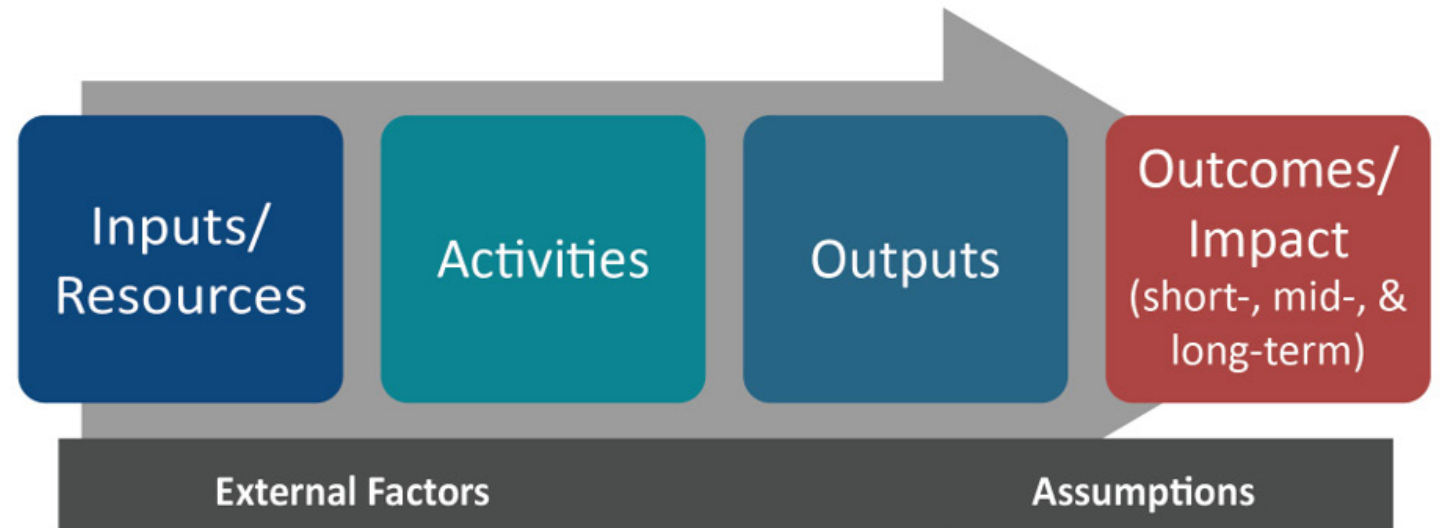
NCSRC OY 2 Workplan						
Contract Deliverable	Task Name	Status	Assigned To	Start Date	End Date	Duration
1.2	Phase-In and Phase-Out Periods			10/26/20	11/02/20	
1.2.2	Phase-Out Plan	Complete - No New Actions Required	Carter Clawson Terrie Yot	10/26/20	11/02/20	
1.3	Quarterly In-Person Progress Meetings (last 3 quarters)	Not Started	Carter Clawson			
	Communicating with the Department			09/17/20	09/21/21	3
1a	Develop kickoff agenda	Complete - No New Actions Required	Carter Clawson	09/17/20	09/28/20	
1b	Hold kickoff meeting	Complete - No New Actions Required	Carter Clawson	10/06/20	10/06/20	
1c	Deliver required documents after kickoff (meeting minutes and participant list)	Final Deliverable Submitted to COR for Approval	Blondeen Philemond	10/14/20	10/14/20	
1d	Deliver draft work plan to client	Final Deliverable Submitted to COR for Approval	Blondeen Philemond	11/10/20	11/19/20	
1e	(Recurring)Biweekly meeting agenda	Ongoing	Blondeen Philemond			
1f	(Recurring)Conduct biweekly call	Ongoing	Blondeen Philemond			3
Unnumbered	(Recurring) Send weekly email	Ongoing	Blondeen Philemond			
1g	Quarterly reports (4)			12/04/20	09/21/21	2
1g(1)	Submit project-wide quarterly report to ED	Final Deliverable Submitted to COR for Approval	Alison Zgainer	12/04/20	12/21/20	
1g(2)	Submit project-wide quarterly report to ED	Not Started	Alison Zgainer	03/05/21	03/22/21	
1g(3)	Submit project-wide quarterly report to ED	Not Started	Alison Zgainer	06/04/21	06/21/21	
1g(4)	Submit project-wide quarterly report to ED	Not Started	Alison Zgainer	09/04/21	09/21/21	
	Operations			10/15/20	11/30/20	
2.1a(1)	Submit proposed TWG participant list to ED	Final Deliverable Submitted to COR for Approval	Carter Clawson	10/15/20	10/19/20	
2.1a(2)	Submit proposed timeline for TWG meetings (and request approval for any in	Final Deliverable Submitted to COR for Approval	Carter Clawson	10/15/20	10/19/20	
2.1b	(Recurring) Develop TWG meeting agenda based on topics identified by team	Final Deliverable Submitted to COR for Approval	Carter Clawson	10/16/20	10/29/20	
2.1c	(Recurring) Develop TWG PPT presentation	Final Deliverable Submitted to COR for Approval	Carter Clawson	10/23/20	10/29/20	
2.1e	(Recurring) Conduct TWG meeting and facilitate discussion	Complete - No New Actions Required	Carter Clawson	11/11/20	11/11/20	
2.1f	(Recurring) Develop and distribute meeting notes to TWG participants and EI	Complete - No New Actions Required	Blondeen Philemond	11/15/20	11/19/20	
2.2a	Draft work plan for TWG	Complete - No New Actions Required	Carter Clawson	11/11/20	11/11/20	
2.2b	Collect, analyze, and incorporate TWG feedback into work plan	Complete - No New Actions Required	Carter Clawson	11/18/20	11/19/20	
2.2c	Finalize workplan (including TWG and client feedback)	Final Deliverable Submitted to COR for Approval	Carter Clawson	11/30/20	11/30/20	

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Creating a Work Plan

- Start with your logic model
- Take a look at the **Activities** and the **Outputs** of your logic model
- Breakdown the work into smaller, more manageable components (“decomposition”)



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Work Plan Components

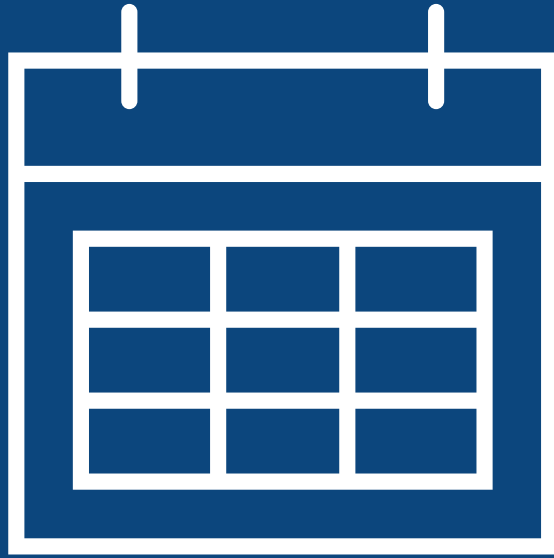
- Create and complete a work plan based on those management components. A typical work plan includes:
 - ✓ Task
 - ✓ Responsible party
 - ✓ Related activities
 - ✓ Due dates & milestones
 - ✓ Cost estimates
 - ✓ Quality metrics/requirements



Quiz #1

What is decomposition?

1. Creating targets for your APR based on your objectives.
2. Breaking down the grant work into smaller, manageable components.
3. Explaining your scope in basic terms to various audiences.
4. Getting so stressed that you have a meltdown and quit your job.



#2

Schedule



Schedule: Key Question to Ask

How will you maintain
your project schedule in
a realistic yet
accountable way?





Schedule: Key Practice – Rolling Wave Planning



Rolling Wave Planning

- ☐ Define earliest grant activities in detail.
- ☐ Elaborate and add detail to future activities over time.



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Schedule: Key Practice – Traditional Project Schedule



Create a Traditional Project Schedule to Inform Work Plan

- ☐ Estimate sequence of activities
- ☐ Adjust for dependencies
- ☐ Estimate duration of each activity
 - Top-down
 - Bottom-up
- ☐ Align with work plan
- ☐ Revisit schedule

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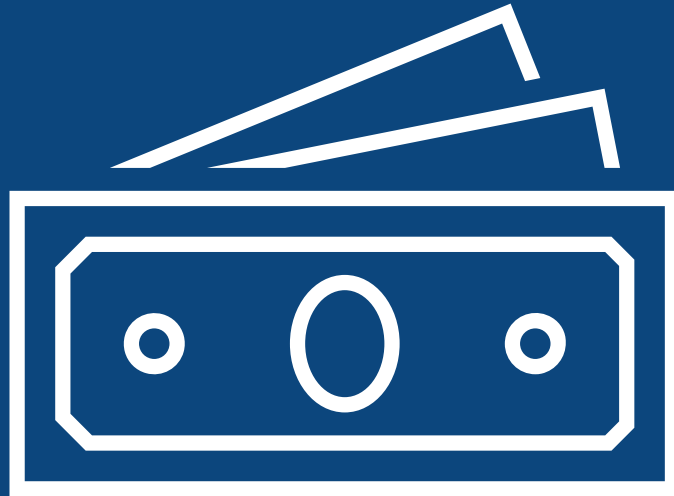




Quiz #2

You are having a hard time determining every single activity you must do to achieve your objectives, because some details cannot be finalized until some new information become available. What is the best way to resolve this problem?

1. Wait to establish a final work plan and schedule until you know everything you need to know.
2. Use a rolling wave approach.
3. Just focus on your budget; don't worry about the schedule.
4. Sleep on it.



#3

Budget



Budget: Key Question to Ask

How is the project budget managed and cost controlled?





Budget: Key Practice – Know Your Role



Know your role as Project Director.

- You should have knowledge of:
 - Approved budget
 - Statutory and regulatory requirements and conditions
 - Resource: The Uniform Guidance (2 CFR § 200)
 - Procedures for determining if costs are allowable, allocable, reasonable



Budget: Key Practice – Create a Check List

Create a checklist for internal controls.

- Create a checklist of policies and procedures you need to have in place.
- Each must meet federal standards for managing federal funds.
- Review the status of implementation and make updates annually.

★ Note! CSP and NCSRC plan to release checklists for SE and CMO in 2021, but you can get started now and use it to check for gaps.





Budget: Key Practice – Establish Shared Understanding



Establish shared understanding with your finance office.

- On the agenda:
 - Process for expending funds across ED budget categories
 - Process for drawing down from G5
 - Process for you getting regular updates on accounting of federal and non-federal funds (budget to actuals)
 - Status of internal controls



Budget: CSP Tip

Question: What does my Program Officer want to know when they look at my grant in G5? What are they looking for?

Answer: *Are your drawn downs commensurate with your scope and your grant milestones?*

ED will use three reports to determine this:

- G5 drawdown report
- Excessive drawdown report
- Large available balance report





Quiz #3

Which of these is *not* a key requirement of your financial management system?

1. Documents federal and non-federal funds used for project tasks
2. Schedules drawdowns in advance
3. Keeps accurate accounting of federal funds
4. Maintains effective internal controls
5. Includes procedures for determining if costs are allowable, allocable, reasonable



Quiz #4

What of the following is *not* a report that your program officer likely uses to see if your drawn downs are commensurate with your grant scope and milestones?

1. Excessive drawdown report
2. Large available balance report
3. Allowable costs report



#4

Quality



Quality: Key Question to Ask

What are your quality standards? How is your performance?



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Why Measure Quality?



- Continuously improve in service of the field.
- Prevent monitoring findings (Prevent rather than inspect).
- Quality work on your project may not always be apparent in your interim/annual reports; we need additional ways to measure and replicate success.

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Quality: Key Practice

Create and Measure Against Quality Standards and Metrics



- ✓ Start with what you report on and expand from there.
- ✓ Determine what quality looks like for your team and how to measure.
 - ✓ % of tasks completed on time
 - ✓ Total website downtime
 - ✓ Satisfaction survey responses
 - ✓ Publication downloads
 - ✓ Focus groups on our services
- ✓ Create Data Collection List and Procedures
- ✓ Implement > Collect Data > Analyze > Improve

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Quality: CSP Tip



- ☐ **S**taff Development – Beyond Onboarding
- ☐ **T**eam Building – Not Just for Retreats
- ☐ **A**lways Asks Questions – Answers=Data
- ☐ **R**ecurring Meeting Topic – “Quality”

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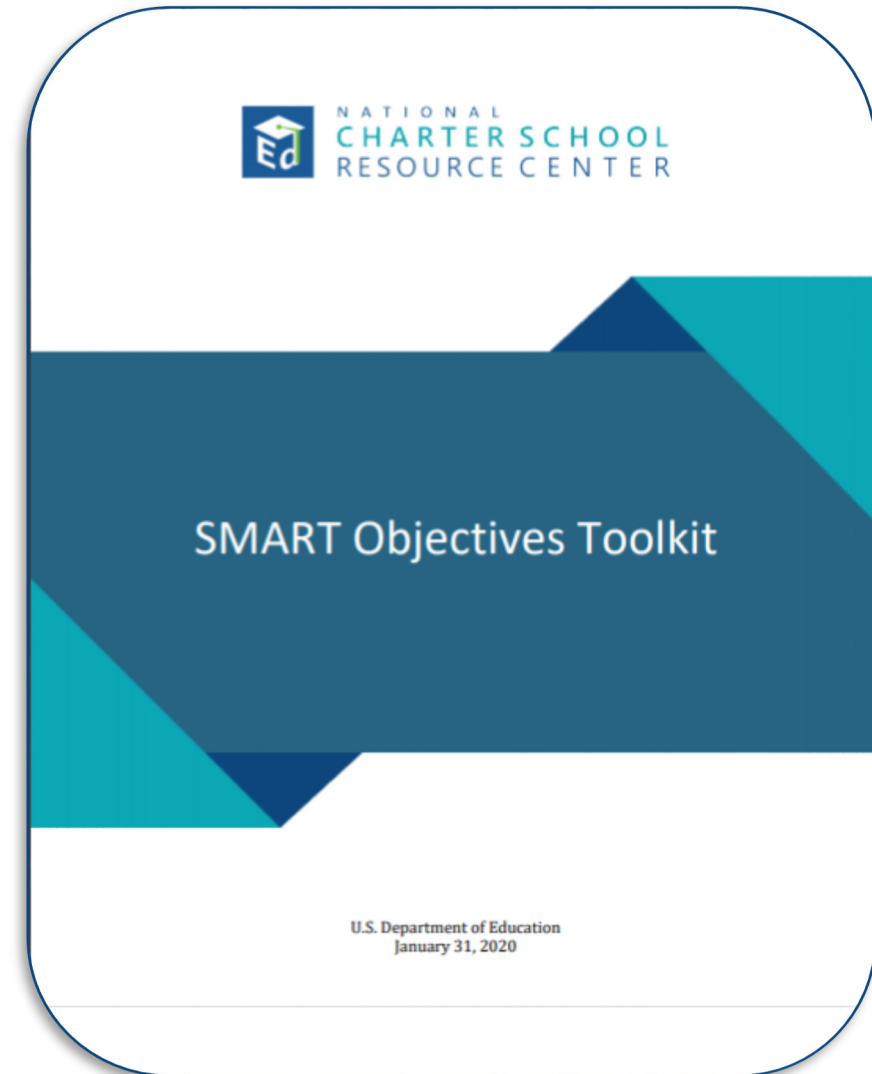




Quality: CSP Tip



<https://charterschoolcenter.ed.gov/publication/smart-objectives-toolkit>



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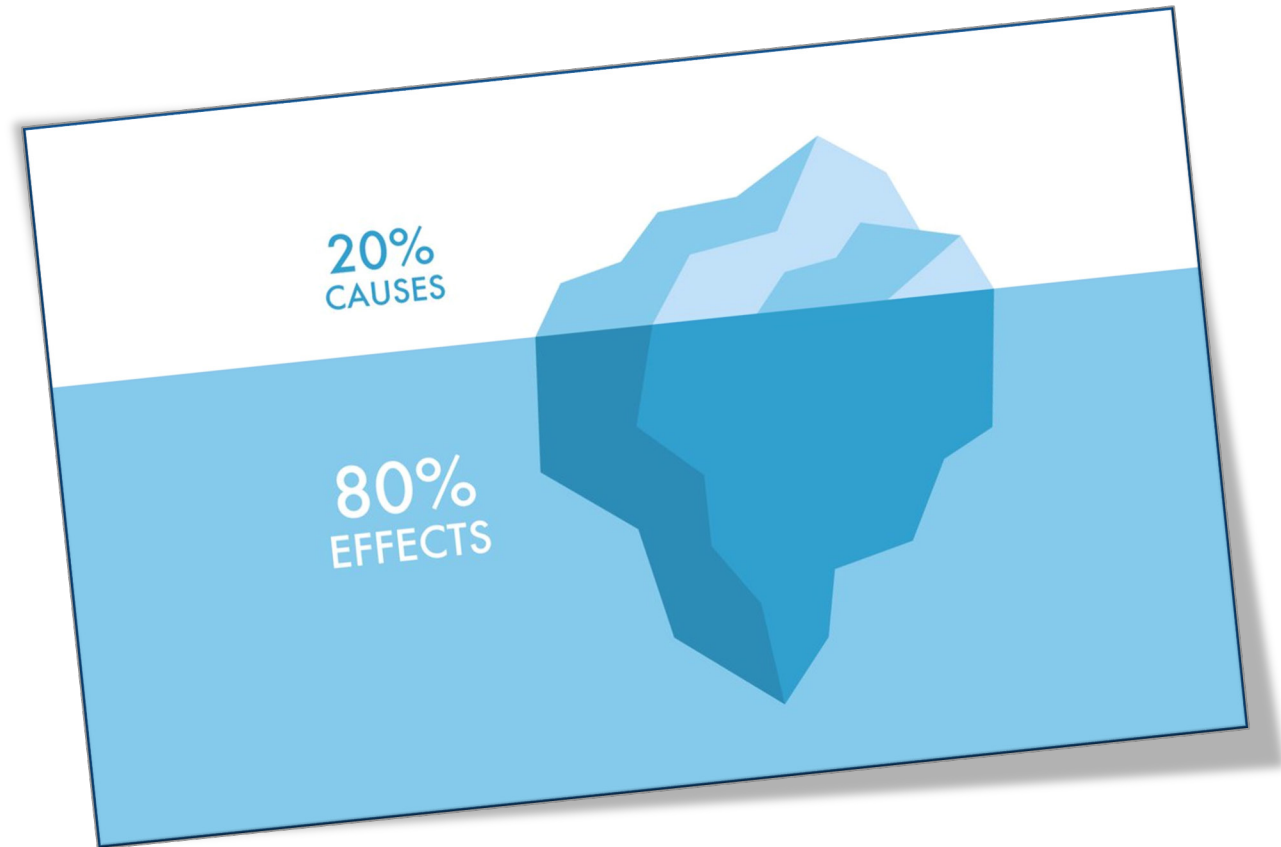




Quality: Key Concept



Pareto Principle or 80/20 Rule



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Chime in the Chat #1

What is one way you measure quality on your project?



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#5

Human Resources



Human Resources: Key Question to Ask

How do you organize,
manage, and lead your
team?



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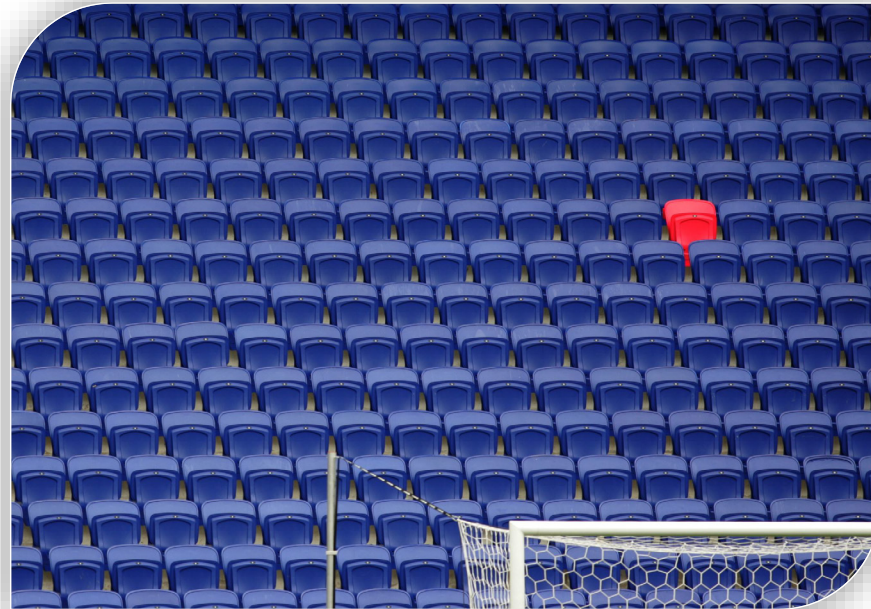
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Human Resources: Key Practice – Define Roles and Responsibilities

Clearly Defined Roles and Responsibilities



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RACI Matrix

Role	Assigned
Responsible	[Enter name]
Accountable	[Enter name]
Consulted	[Enter name]
Informed	[Enter name]



RACI Matrix for Completing APR (my prior job)

Role	Assigned
Responsible	Carter, Deputy Director
Accountable	Frank, Project Director
Consulted	Jemar, Data Analyst
Informed	Hansol, Communications

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Human Resources: Key Practice – Managing Teams



5 Key Practices in Managing Teams

- ✓ Provide feedback
- ✓ Manage to strengths/interests
- ✓ Provide meaningful growth opportunities
- ✓ Resolve conflict
- ✓ Focus on team morale and culture



#6

Communications



Communications: Key Question to Ask

How will you keep
everyone informed?



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Communications: Key Practices – Develop a Plan

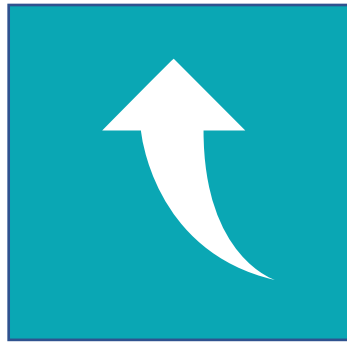


- ✓ **Develop Internal Communications Plan**
 - ✓ The collection and distribution of project-related information
 - ✓ How those involved in grant execution communicate
- ✓ **Develop External Communications Plan**
 - ✓ How you communicate project status, challenges, and success to those impacted by your grant

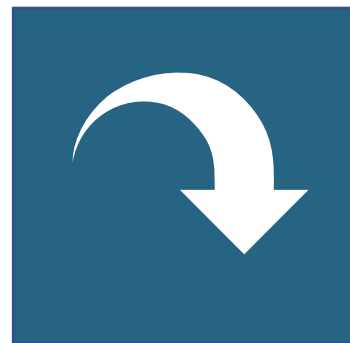


Communications: Key Practice

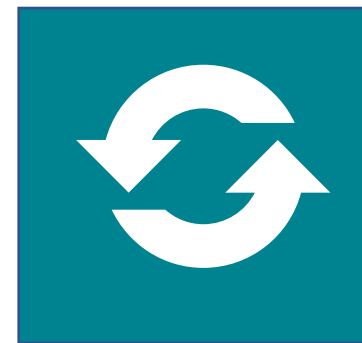
Explore all 3 communication methods.



Push



Pull

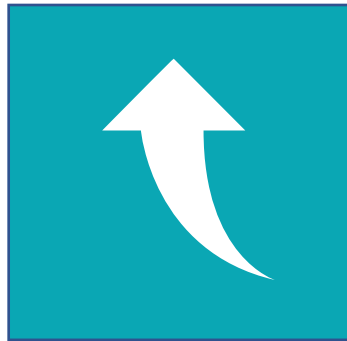


Interactive

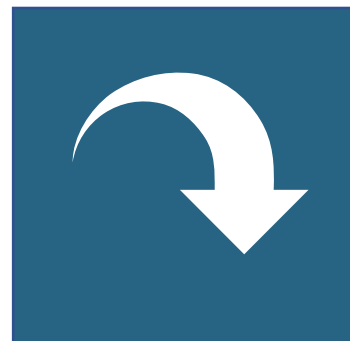


Poll #2

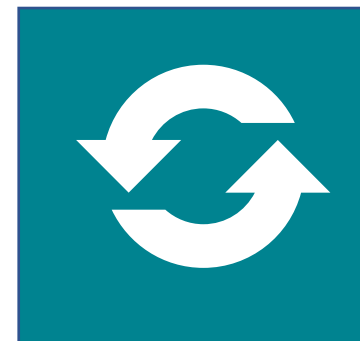
Which communication method do you tend to use the most related to your CSP grant?



Push



Pull



Interactive



Communications: Key Practices



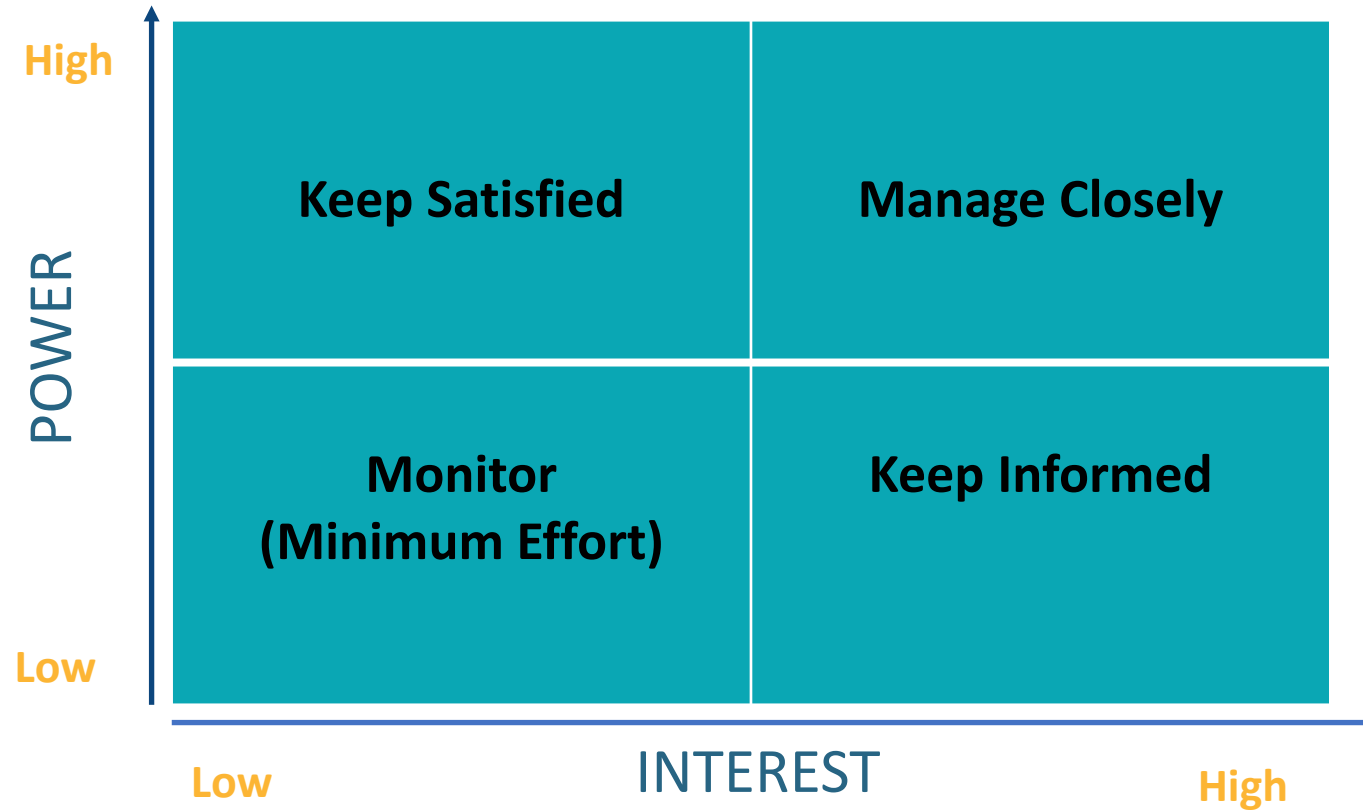
Keep your Friends Close, and Your Stakeholders Closer.

Why?

- ✓ The opinions of your most powerful stakeholders can shape your project at an early stage.
- ✓ Their input can also improve the quality of your project.
- ✓ Their understanding of your project positions your stakeholders to be supporters. Their support can help you to acquire more resources.



Stakeholder Power Grid



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Chime in the Chat #2

What is one stakeholder group impacted by your grant work that you aren't fully reaching, but you'd like to communicate with more effectively in the future?



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#7 ***Risk***



Risk: Key Question to Ask

What are the possible events that could impact project (+ or -)?





Risk: Key Practices



Steps For Risk Management

- ✓ Assess for risks at regular intervals
- ✓ Prioritize risks
 - Assess probability and impact
- ✓ Plan a response for each risk
 - Avoidance
 - Mitigation
 - Transference



Quiz #5

You, as the project director or manager, meet with the team to review lessons learned from previous CSP-grant projects with a focus on what did not go so well last time. In what activity is the team involved?

1. Performance management
2. Scope creep assessment
3. Risk identification
4. Project status meeting



Putting it All Together

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A Project Manager is the conductor, integrating the 7 components of project management in harmony.



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Chime in the Chat #3

Of the 7 components, which is your strongest?



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Reminder: The 7 Major Components of Every Project



Scope



Schedule



Budget



Quality



Human Resources



Communications



Risk

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Chime in the Chat #4

Of the 7 components, which would you like to work on? What's one thing you might do differently in that area going forward?

Is this an area in which you'd like a deeper dive with CSP/NCSRC?



Mix a little
foolishness with
your serious plans:
it's lovely to be silly
at the right moment.

- Horace



*"Thank goodness you're here—I can't accomplish
anything unless I have a deadline."*



Thank you for
joining!

How did we do?