

***Project Management
for Education
Success***

User's Guide

October 2008

Project Management for Education Success

Background

The Delaware Education Support System (DESS) is a statewide system of support in Delaware for improving student outcomes. The framework of DESS consists of three domains of continuous improvement: Connections to Learning, Teaching and Learning, and Leadership for Learning. The domains serve as lenses for the Department of Education, districts and schools to identify areas in need of improvement that can be addressed through professional development and technical assistance. There are also suggested measures within each domain to assist with the needs assessment process. Finally, each domain includes suggested strategies and resources to improve areas of need.

The Education Success Planning and Evaluation System is a tool within the Delaware Education Support System (DESS) that allows plans to be developed, managed and monitored to ensure future improvement and success in the areas of need. The major elements of Success Plans are goals, objectives, measures and strategies. A strategy within Success Plans is a specific series of actions aimed at improving areas of need. Project management is an effective way to ensure the faithful implementation of strategies.

Project Management Introduction

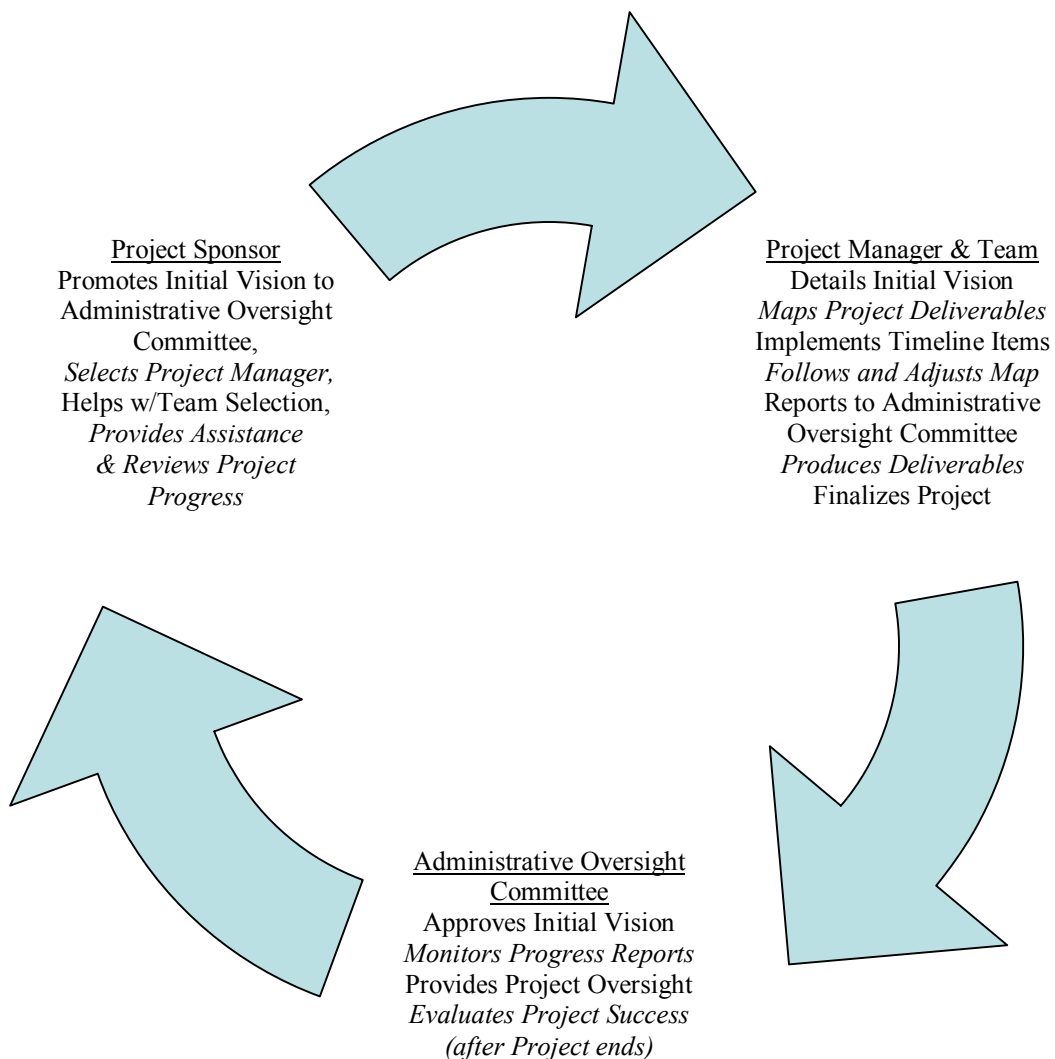
Business executives use Project Management to make vital changes and improvements quickly and effectively. A business must change rapidly and operate efficiently, or it will be put out of business. Project Management is a proven management tool with its own business-based terminology. It is also a tool that can be adopted by districts and schools with limited time and other resources to make vital changes and improvements.

This Users Guide has exchanged business terminology for the terms that are more specific to districts and schools. (A glossary of terms can be found on pages 11-14 of this document.) While remaining true to concepts of Project Management that have already been perfected, this guide represents the adoption and simplification of basic Project Management elements that can be easily utilized for Education Success projects. These customized, basic methods and tools of Project Management can be used to:

1. provide necessary administrative sponsorship and oversight
2. identify and secure the resources needed
3. clarify the purpose and scope of the project
4. delineate tangible and verifiable deliverables
5. detect and manage related issues
6. facilitate project centered communication
7. define and map the project scope, track the project, and close the project
8. employ proven processes to enhance the chances of success

Project Management for Education Success

Project Elements...



...& Project Flow

Overview

Project Management for Education Success is intended to provide standardized procedures that will assist in the efficient implementation and completion of qualifying Education Success projects. Qualifying projects are large projects that impact multiple teachers, departments, or schools; have a targeted time for completion; require the approval and cooperation of more than one administrator for the assigned Project Team to achieve desired success; and be essential to the district's or school's Success Planning.

Education Success projects must be sponsored by a district or school administrator. The Project Sponsor will provide the overarching vision for the project and obtain the approval of the Administrative Oversight Committee prior to initiating the project. The Project Sponsor will recruit the Project Manager, direct the Project Manager, assist the Project Manager, and, when needed, provide administrative-level influence and/or assistance for the project. The Sponsor will provide any influence needed to facilitate the selection of essential Project Team Members.

Project Management for Education Success utilizes standard terminology and clearly-defined procedures. Standardized templates for Project Maps are provided to facilitate the efficiency of the process, ensure the common understanding of the vision, and document the progress of the project. The Project Sponsor uses the template to provide very basic project components and the related Success Plan references for the Project Manager. The Project Manager works under the guidance of the Sponsor to complete the detailed project components with the Project Team. The Project Manager is responsible for ensuring that the Project Map is periodically updated. The Project Map uses timelines to track both the progress of the project and the remaining steps.

The Project Sponsor provides project initiation and on-going guidance, and the Administrative Oversight Committee will provide project oversight. The Administrative Oversight Committee receives regular reports from the Project Manager regarding the project's progress and impediments to the project's progress. This committee provides any needed assistance that is beyond the control of the Sponsor and the Project Manager. Only the Administrative Oversight Committee will have the control to allow and direct any substantial changes to the initial project.

To facilitate communications it is recommended that the Project Team make presentation(s) to inform staff and other leadership as deemed necessary by the Project Sponsor. The purpose of the presentation(s) is to ensure there is knowledge of ongoing Education Success Projects to all appropriate parties. Presentation(s) should be planned and included as part of the project-mapping process.

Project Management may seem to increase the amount of work for an Education Success Project Team; however, this system is actually a tool that can assist any Project Team to:

1. share a common project vision
2. limit unnecessary additions to the scope of the original project
3. schedule project activities
4. monitor project progress

5. make adjustments when needed
6. bring the project to a timely and successful conclusion

The purpose of the Project Management Process is threefold:

1. to provide for the timely and successful completion of projects
2. to provide a management system that will enhance the ongoing work of the school or district.
3. to efficiently streamline the project process to minimize the time taken away from the work loads of team members.

Education Success Plan Connections

As mentioned earlier, a strategy within a Success Plan is a specific series of actions connected to the measures, objectives and goals aimed at improving areas of need. Project management is an effective way to ensure the faithful implementation of larger strategies. Any qualifying Education Success Project should be connected with one or more of the elements of the Success Plan at the strategies level. The Project Map templates show how the Deliverables and Tasks of a Project relate to the overall Education Success Plan of a school or district.

Administrative Oversight Committee

The Administrative Oversight Committee is usually comprised of individuals at the highest level of leadership in the organization. It is the group within the organization that is responsible for the approval of projects before they are initiated. It is also the group that provides input during the periodic updates by the Project Sponsor, Manager and Team. The group is responsible for assisting the Project Sponsor if any barriers to completion arise. In a school or district, this could be the Board of Education, a select group from the central office or the school.

Project Sponsor

The Project Sponsor is the person with the highest level of authority and responsibility for accomplishing the deliverables of an Education Success Project. Each Project must be linked to the district or school Success Plan at the strategies level since ultimately the strategies support the measures, objectives, goals and vision of the Success Plan. The Sponsor will include Success Plan elements as part of the initial Project Map (using the web-based site) to define and communicate the project when it is first presented to the other Administrative Oversight Committee members.

Once the initial concept for the project has been approved by the Administrative Oversight Committee, the Project Sponsor oversees the work of the Project Manager and Project Team as they finish developing the Project Map.

Project Manager

Project Management for Education Success uses appropriate elements of project management as used extensively in business, industry, and construction. Following this lead dictates that there will be only one Project Manager. When the Administrative Oversight Committee desires that another person should have greater influence than the normal influence of a Project Team Member, that person can be given the role of Assistant Project Manager.

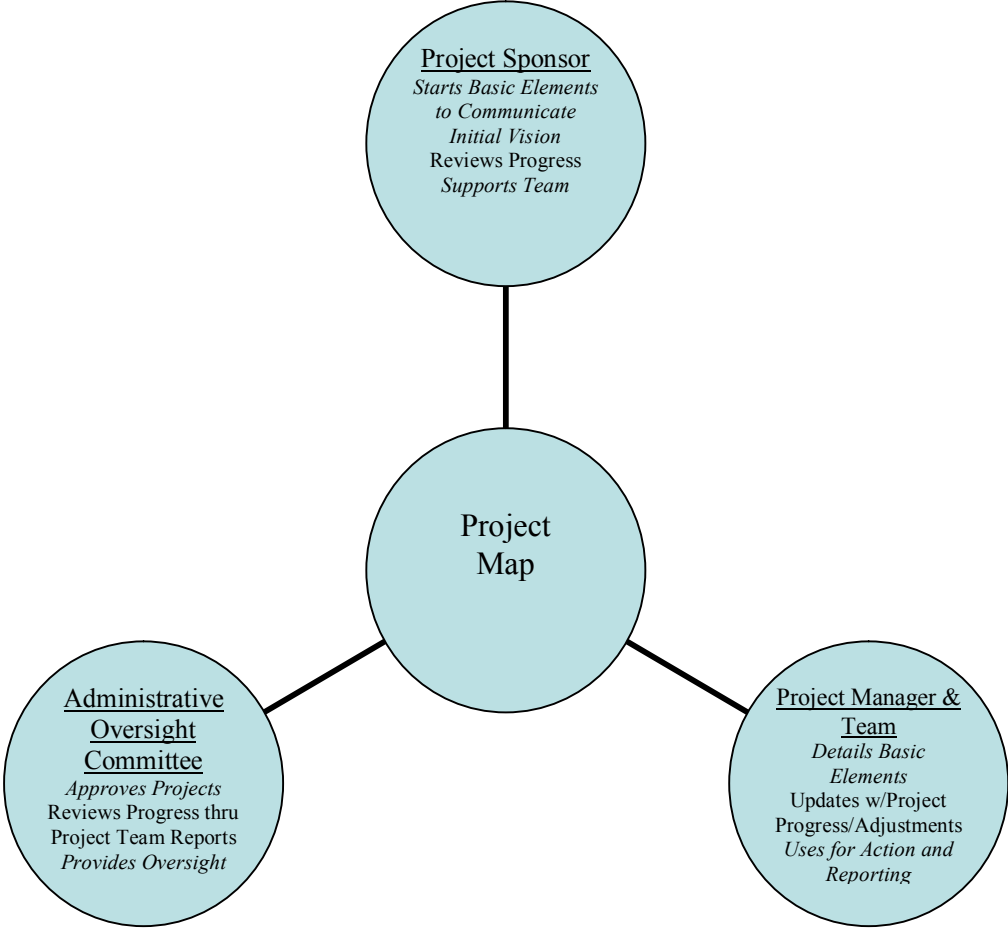
The Project Manager plays a pivotal role in the Project Management for Education Success Process. The Project Manager develops the concept of the Project Sponsor into the detailed Project Map, along with the Project Sponsor and Project Team. The Project Manager then executes the plan, reviews ongoing progress, directs reporting of progress, identifies and deals with issues, manages any budget items, and delivers the goals of the project within the major project timelines.

Project Team Members

The Project Sponsor will work with the Project Manager to identify Project Team members. The Sponsor will work with the Administrative Oversight Committee and/or other administrators to assemble an appropriate team. Each team should have a designated secretarial staff member assigned. When assembling a team, consideration should be given to the:

1. expertise needed to complete various project components
2. strategic location of prospective members within the organization
3. need for someone to help assemble the monthly Project Team reports
4. existing workloads of prospective members, including other, current Project Team assignments

Education Success Project Chart...



...Usage by Key Players

Template for the Project Management Map

A Project Management web-based Project Mapping template has been tailored for use by districts and schools. Templates can be used in many ways. Usage can even include writing on printed templates, providing the support staff or other team member types-in this information later. The object of using the resulting Project Management Map is to have a simple tool that can be understood by everyone. This tool can be used in all stages of the project:

1. Planning
2. Executing
3. Monitoring
4. Adjusting
5. Item Check-off
6. Final Check-off

Deliverables noted on the Project Management Map should be nouns that denote specific products or occurrences that are to be delivered. Each Deliverable should have one or more Project Team members assigned to specific activities that relate to accomplishing the goals that lead to final delivery.

The screenshot displays the 'Project Management' section of the Delaware Department of Education's website. The main content area features a table titled '1 : Web-based Education Success Planning and Evaluation Tool'. The table lists various tasks with their respective completion statuses and assigned personnel.

Edit	Delete	Task Number	Description	Start Date	Projected End Date	% Complete	Responsible Person	Actual Completion Date	Auto Task
		1.01	Success Plan Web-based Component	5/1/2007	2/15/2008	Completed!	Jarrell, Ted	2/15/2008	
		1.02	LEA Consolidated Grant Web-based Component	5/1/2007	2/15/2008	Completed!	Jarrell, Ted	2/15/2008	
		1.03	School Improvement Grant Web-based Component	10/15/2007	6/15/2008	95% complete	Jarrell, Ted	n/a	
		1.04	Compliance Monitoring Web-based Component	3/15/2008	7/1/2008	Completed!	Jarrell, Ted	7/15/2008	
		1.05	Data-driven Evaluation Component Web-based	6/1/2008	7/31/2008	95% complete	Jarrell, Ted	n/a	
		1.06	Project Management Component Web-based	10/15/2007	6/13/2008	Completed!	Jarrell, Ted	6/30/2008	
		1.07	Set-up Web-based Tool through single sign-on	10/15/2007	2/13/2008	Completed!	Jarrell, Ted	2/15/2008	
		1.08	Advisory Feedback on Success Plan, LEA Consolidated Application, School Improvement Grant, Evaluation, Project Plan	6/1/2008	8/15/2008	Yet to be started	Jarrell, Ted	n/a	
		1.09	Success Plan Web-based Component- Year Two enhancements	8/1/2008	1/15/2009	Yet to be started	Jarrell, Ted	n/a	
		1.10	LEA Consolidated Grant Web-based Component- Year Two enhancements	8/1/2008	1/15/2009	Yet to be started	Jarrell, Ted	n/a	
		1.11	School Improvement Grant Web-based Component- Year Two enhancements	10/15/2008	3/15/2009	Yet to be started	Jarrell, Ted	n/a	
		1.12	Compliance Monitoring Web-based Component- Year Two	1/15/2009	5/15/2009	Yet to be started	Jarrell, Ted	n/a	

Team Meetings-Updating the Map

Project Managers can update their Project Map whenever the project needs this to happen; however, even the status of slow-moving Success Projects must be reviewed and prepared for reporting at least once per month. The Project Team should meet monthly at a pre-planned time to review the project status and simultaneously update the Project Map. If the Project Sponsor cannot attend a meeting, the Project Manager should communicate progress and issues soon after the meeting. The updated Project Map should be one of the tools used in this communication.

The updated Project Map will also be used in providing project reports to the Administrative Oversight Committee or other groups. Team meetings should be held in advance of monthly Administrative Oversight Committee meetings. The Project Manager should leave enough time between Project Team meetings and Oversight Committee meetings to allow for clarifying any unexpected information/issues brought up during team meetings. This will facilitate providing a more updated report to the Administrative Oversight Committee.

Changing Map Timelines

Project teams will construct initial timelines on their Project Maps. There will usually be major and minor timelines. Major timelines represent dates that are project milestones. Sometimes these timelines are also dates or deadlines when major project deliverables must be ready, in order for the project to be successful. If major deadlines are missed, projects may be viewed as behind schedule.

Minor timelines are used to reach major deadlines. “Tweaking” of these timelines as the project progresses is sometimes necessary and not problematic (if the tweaking does not adversely impact any major deadlines). Project Teams should tweak minor timelines as needed to update the Project Map. The impact of this tweaking should be on major timelines should be examined before they are considered final. If the impact is adverse, changes to minor timelines should be re-examined to see if other adjustments can be made.

Any changes to major timelines must first be approved by the Project Sponsor. If this first approval is achieved, these changes must then be presented to and approved by the Administrative Oversight Committee.

Reporting to the Administrative Oversight Committee

Prior to the Administrative Oversight Committee meeting, a Project Manager should update the Project Map to reflect input from the Project Team meeting as well as from other updates from Project Team members. The Project Manager should be prepared to report monthly, if asked by the Project Sponsor. The Administrative Oversight Committee will review their list of ongoing Education Success Projects monthly and decide when they will need to receive reports. The Project Sponsor will make the arrangements with the Project Manager to bring the report forward. If other groups also wish to receive an informational presentation, these arrangements must be approved by the Sponsor who will arrange the presentation with the Project Manager.

The report should last no longer than 15 minutes to allow time for questions and answers after the report. Reports should be no more elaborate than necessary; the important goal of the Project Management for Education Success process is successful completion of the project, not the creation of lavish reporting media. Updated Project Maps should be distributed to all Administrative Oversight Committee members. No reports should be shown to the Administrative Oversight Committee without first giving a review to and getting approval from the Project Sponsor.

The minimum Project Team Members that should be present at Administrative Oversight Committee meetings are the Project Sponsor and the Project Manager. Forward-thinking Sponsors and Managers may have included a Project Team Member whose purpose is solely to prepare reports. This Project Reporter may also participate in or even lead the reporting process. In addition to the sponsor, manager, and reporter, other select team members may occasionally need to participate in the report or the question and answer session.

If the Project Management Team is asked to report to other groups by the Project Sponsor, they should repeat the most recent report to Administrative Oversight Committee for those groups. Everyone who was at the Administrative Oversight Committee presentation may not need to attend these presentations. To keep the team from being bogged down giving too many reports, these requests should be kept to a minimum.

Glossary of Education Success Plan Elements

Vision	<p>The VISION in a Success Plan is a word picture of what the organization intends ultimately to become in the future. (example: Cultivating Students of Distinction Disciplined People; Disciplined Thought; Disciplined Action Christina School District is a system of education where research-based teaching and learning cultivate students of distinction at high levels, and where the entire community works together to put children first.)</p>
Mission	<p>The MISSION in a Success Plan is a statement that defines the core purpose of the organization. (example: Our mission is to educate each student to succeed through: Expectations of Excellence; Safe Working and Learning Environments; Respect for Diversity; and Caring and Knowledgeable Staff Members.)</p>
Needs Assessment	<p>The NEEDS ASSESSMENT in a Success Plan is the determination of the needs of the students, staff and community and, to the extent that they can be identified, the underlying causes of these needs.</p>
Goals	<p>The GOALS in a Success Plan are the statements of future achievement that are designed to attain the mission (example: Accelerate achievement for all students and minimize the disparities among all groups of students.)</p>
Objectives	<p>The OBJECTIVES in a Success Plan are the measurable outcomes that support the goals. (example: Each school will have highly qualified teachers.)</p>
Measures	<p>The MEASURES in a Success Plan are the quantitative indicators that gauge the status of the objectives. (example: % of classes taught by highly qualified teachers in Elementary Schools; Target date 7/1/2008; Target value 99%)</p>
Strategies	<p>The STRATEGIES in a Success Plan are the statements that describe how the organization will influence the measures. (example: Continue HQT hiring practices and support of teachers to become HQT.)</p>

Glossary of Project Management for Education Success Terms *(in alphabetical order)*

Activities	ACTIVITIES in a Success Plan are the specific items that will be funded through grant funds to help produce a deliverable, implement a new strategy or support the continuation of routine work within the organization. (example: Pay for Praxis II Test Fees; Title II, Part A - \$7,800.)
Administrative Oversight Committee	The ADMINISTRATIVE OVERSIGHT COMMITTEE is the group within the organization that is responsible for approval of all projects before they are initiated. The administrative oversight committee is usually comprised of individuals at the highest level of leadership in the organization. The project sponsor and project manager give periodic updates on the project status to the Administrative Oversight Committee. It is this committee's responsibility to assist the Project Sponsor and Project Team with addressing any barriers that arise that could potentially effect the project's completion. (example: local board of education, superintendent or principal and other select individuals in a district or school)
Assumptions	An ASSUMPTION (as used in the Education Success Project Map) refers to a condition or an event that must exist or occur in order for the project schedule and the project costs to be met as documented in the project map.
Deliverable	A DELIVERABLE (as used in the Education Success Project Map) is a specific product or event that is to be produced by a project. Deliverables should be expressed as nouns in the project management document. Deliverables are intended to align with and produce the desired results expected from a project. (examples: training session, a document, a software product, a process definition)
Dependencies and Impacts	The DEPENDENCIES AND IMPACTS (as used in the Education Success Project Map) are other projects, efforts, groups, processes and/or standards that are related to, that affect, or may be affected by, the project being planned.
Desired Results	The DESIRED RESULTS (as used in the Education Success Project Map) refer to the specific end results that are expected to be accomplished through the efforts described in the project.

**Education Success
Project Map**

AN EDUCATION SUCCESS PROJECT MAP is a document that describes a project in terms of its scope, schedule, assumptions and resources, deliverables and tasks. It facilitates project planning and approval. It also establishes a high level of understanding between the sponsor and the rest of the project team to help ensure a project's success.

**Monthly Project
Management Report**

A MONTHLY PROJECT MANAGEMENT REPORT is a report completed once per month by the project manager. It is intended to be reviewed by the project manager with the sponsor. This report outlines the project status and identifies any issues or items that need attention in order to keep the project on schedule and on budget.

Project

A PROJECT is any effort that has a definite beginning and ending. It has a defined work scope and results in a tangible product (example: developing a new payroll system, implementation of Positive Behavior Supports). Routine work within existing functional organizations should not be considered a project (example: monthly payroll, ongoing Positive Behavior Supports).

**Project Management
Process**

The PROJECT MANAGEMENT PROCESS is a structured method focused on obtaining desired results. It is any activity or group of activities that takes an input, adds value to it, and provides an output to an internal or external customer. A project management process is focused on obtaining the desired results from an organization's projects.

Project Manager

A PROJECT MANAGER is responsible for the day-to-day direction of a project, under the direction of the sponsor. The project manager develops and maintains the Project Map. The project manager executes the project according to the Project Map, conducts work reviews for all significant deliverables, identifies and tracks issues, manages the project budget (if applicable), and ensures the quality of the deliverables.

Project Map

A PROJECT MAP is the standardized template tool (web-based or hard copy) for the Project's written plan of action.

Project Sponsor

A SPONSOR has the highest level authority and responsibility for the success of a project (oversees the project manager). The sponsor is responsible for ensuring that the project, its desired results and specific outcomes are successfully delivered. The sponsor oversees the project manager.

**Project
Team**

A PROJECT TEAM is made up of individuals who work together as a team under the direction of a project manager to complete a project.

Scope	The SCOPE of a project (as used in the Education Success Project Map) is a description of the work to be performed in terms of the desired results and deliverables.
Project Description	The PROJECT DESCRIPTION is the brief background and description of the project including information on the need/problem that the project is intended to address.
Tasks	TASKS in a project map are the specific activities that must be completed to produce a deliverable. Each task includes a start date, projected end date, responsible person and information on completion status. (example: conduct focus groups, research best practices, schedule training)

Acknowledgements: Components of this document are from training materials prepared and presented to the Delaware Department of Education by CELT Corporation under contract with the Council of Chief State School Officers (CCSSO) January 2005.

Appendix A

The following two worksheets can be used to assist in development of Success Plans and Project Management Maps. These can be copied and paste into a word document. Text boxes are provided for you to fill in.

Success Plan Worksheet

GOAL <i>Historic Summary of Cause:</i>	OBJECTIVE <i>Description including measures:</i>	STRATEGY
		STRATEGY
	OBJECTIVE <i>Description including measures:</i>	STRATEGY
		STRATEGY
	OBJECTIVE <i>Description including measures:</i>	STRATEGY
		STRATEGY

Project Management Worksheet

		Task
	<p>DELIVERABLE</p> <p><i>Describe product, assumptions & dependencies:</i></p>	<p>Task</p> <p>Task</p>
		Task
<p>PROJECT</p> <p><i>Description of project and which strategies this project supports – include start date and end date:</i></p>	<p>DELIVERABLE</p> <p><i>Describe product, assumptions & dependencies:</i></p>	<p>Task</p> <p>Task</p>
		Task
	<p>DELIVERABLE</p> <p><i>Describe product, assumptions & dependencies:</i></p>	<p>Task</p> <p>Task</p>