OVERVIEW OF MANAGING PROJECTS IN AN IRPE OFFICE:

Introduction to Project Management

RP SUMMER INSTITUTE 2018

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DISTRICT DIRECTOR, RESEARCH, PLANNING, AND DATA MANAGEMENT
SOUTH ORANGE COUNTY COMMUNITY COLLEGE DISTRICT
GENERAL TYPES OF PROJECT MANAGEMENT IN IRPE OFFICES

MANY OFFICES HAVE A REQUEST FORM THAT CAPTURES INFORMATION

DEFINE TYPES OF PROJECTS
- DATA REQUESTS
- SURVEYS
- REPORTS
- EVALUATION
- GRANT APPLICATIONS
- PRESENTATION
- WORKSHOPS

REQUESTORS
- FACULTY, STAFF, EXECUTIVES, COMMUNITY

TYPE OF REQUEST
- ONE TIME OR REOCCURRING

CAPACITY

PRIORITIZATION
How do you manage projects in your office?

What methods do you employ to manage projects?
My experience and Project Management

- District Director - Built and Manage our Data Warehouse
  - Work closely with IT
  - Employ methodologies for building software and implementing software
  - Agile Software Development
  - Project Management

- Professional Development
  - With IT Directors took a 3 day course -Project Management Institute
  - Prep for PMI test

- Project Manager in IT – Iden Sadeghieh
  - MBA in Information Technology focus on Project Management
Project management is the practice of initiating, planning, executing, controlling, and closing the work of a team to achieve specific goals and meet specific success criteria at the specified time.

The primary challenge of project management is to achieve all of the project goals within the given constraints. This information is usually described in project documentation, created at the beginning of the development process. The primary constraints are scope, time, quality and budget.
The secondary — and more ambitious — challenge is to optimize the allocation of necessary inputs and apply them to meet pre-defined objectives. The object of project management is to produce a complete project which complies with the client’s objectives.

In many cases the object of project management is also to shape or reform the client's brief in order to feasibly be able to address the client's objectives.

Once the client's objectives are clearly established they should impact on all decisions made by other people involved in the project - project managers, designers, contractors, sub-contractors, etc. If the project management objectives are ill-defined or too tightly prescribed it will have a detrimental effect on decision making.

https://en.wikipedia.org/wiki/Project_management
Project management processes fall into five groups:

1. Initiating
2. Planning
3. Executing
4. Monitoring and Controlling
5. Closing

Project management knowledge draws on ten areas:

1. Integration
2. Scope
3. Time
4. Cost
5. Quality
6. Human resources
7. Communications
8. Risk management
9. Procurement
10. Stakeholder management

The Project Management Professional (PMP)® is the most important industry-recognized certification for project managers.
PHASES OF PROJECT MANAGEMENT AND APPLICATION TO IRPE

Initiating & Planning

1. Integration
   - What is the priority of this request?

2. Scope
   - What is the goal and objectives of the project? What questions are being answered? What is the end product desired?
   - What data is needed and is it accessible?
   - Does the data need to be cleaned?
   - What methodologies will be used?

3. Time
   - What is the time-frame?

4. Cost
   - What is the budget? Do you need additional resources?

5. Quality
   - What methodology or process will you use?
   - What is the quality of the data?
   - Who will validate the results and review drafts?
PHASES OF PROJECT MANAGEMENT AND APPLICATION TO IRPE

**Initiating & Planning**

1. Human resources
   - Do you need additional support/staff? (Data entry, transcription, etc.)

2. Communications
   - What communication mechanism work best for the project? Email, intranet site with status updates, regularly set meetings, etc.
   - Who will need to be informed of the project?

3. Risk management
   - Have you identified risks in the project?
     - What if the data is not available? Is there political ramifications to the data used?
     - Other risks for the project not be completed or delayed? (vacations, other competing priorities, etc.)

4. Procurement (if needed)

5. Stakeholder management
   - Who are the sponsors for the project and who will be involved.
What is a Project Charter & Project Scope

**Project Charter** provides a preliminary delineation of roles and responsibilities, outlines the *project* objectives, identifies the main stakeholders, and defines the authority of the *project* manager. It serves as a reference of authority for the future of the *project*. The terms of reference are usually part of the *project charter*. Includes the scope and many of the other areas of the knowledge needed to define the project.

**Project Scope** is the part of *project* planning that involves determining and documenting a list of specific *project* goals, deliverables, features, functions, tasks, deadlines, and ultimately costs. In other words, it is what needs to be achieved and the *work* that must be done to deliver a *project*. 
Data Warehouse Project Charter & Scope of Work

Background:
For years District IT has been discussing the need for a Data Warehouse (DW) for better reporting and analysis. Data has value as information when it’s delivered quickly, properly formatted, concise, accurate and well understood. The DW environment helps this to occur, and is a critical component of management information and other reporting environments. The DW is a well-architected repository of institutional data. It is basically a “cleansed” copy of transaction and other data over time, and is specifically structured for querying, reporting and analysis. The DW will be used as a foundation for all internal management reporting systems, State and Federal reporting. It will also be designed for the College and District researchers, and any other users who need what the DW has to offer.

Scope of Work:
The first year of the Neudesic SIS contract has been approved to begin July 1, 2006. The DW project is expected to kickoff in the January 2007 with additional resources added by March. This first phase is scheduled for one year, however the DW will be an ongoing project incorporating each new phase of the SIS. The Data Warehouse is expected to house data from the student, course, class, categorical files, and eventually HR and Fiscal. This data is extracted from the transaction files and date/time stamped as it is cleansed, transformed, and loaded into the DW. The DW will become the new platform for all State/Federal reporting (MIS, 320, IPEDS), Leadership Information, and most other reporting. Reporting tools will need to be researched and provided for different types of users. A key function of the DW is to replace and stabilize the current extraction process for Enrollment Reporting that exists on the Alpha. The project also includes creating a new LIS on this new platform with new reporting tools.
Critical Risk Factor:
It is vitally important for end users to be involved and actually own this process for replacing the current reporting system called the Leadership Information System (LIS). Neudesic will perform the business analysis to move from the legacy SIS to the new platform/development, and provide project management, dba, BI, and developers to assist in the architecture, planning, development and implementation of the DW.

Start Date: 11/1/2006  End Date: Spring 2008

Resources for Project Team:
Neudesic, internal programmers, district and college staff

Budget:
Part of the Neudesic contract for 2006 and 2007 – $825 - 900 K

Stake Holders and Project Team:

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td>Daily management of project</td>
<td>Tamara King</td>
</tr>
<tr>
<td>Product Owner</td>
<td>Stakeholder, decision maker</td>
<td>Andrea Serban Allan McDougal</td>
</tr>
<tr>
<td>Development</td>
<td>Neudesic, internal programmers</td>
<td></td>
</tr>
<tr>
<td>Design Team</td>
<td>Neudesic, IT Staff/Mgrs, District and College Researchers, Administrative Group</td>
<td></td>
</tr>
<tr>
<td>End User Input</td>
<td>VC TLS, Director of IT, College/District Researchers and Administrators, and others as selected</td>
<td>Andrea Serban Allan McDougal</td>
</tr>
</tbody>
</table>
2.2. Content
Counseling appointments with students from both the Saddlback and IVC SARS databases.

Conceptual Data Model

The purpose of this document is to define the requirements for Phase 8 of the South Orange County Community College District Data Warehouse initiative to provide reporting and analysis of student appointments from the SARS system. It provides a detailed definition of the datasets and elements that will be copied on a nightly basis into the existing SOCCCD data warehouse.

2.1. Purpose

Data Warehouse Project Charter & Project Scope
2.3. Cube Type

- Regular
- Real-Time

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**Counseling Datamart Physical Data Model**

5/2009

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### 3.0 Primary Stakeholder(s)

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denise Inciong</td>
<td>Director of Research and Planning</td>
<td><a href="mailto:dinciong@socccd.edu">dinciong@socccd.edu</a></td>
</tr>
<tr>
<td>Tamara King</td>
<td>MIS Manager</td>
<td><a href="mailto:tking@socccd.edu">tking@socccd.edu</a></td>
</tr>
</tbody>
</table>

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### 3.1 Notification(s)

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mike Chamsay</td>
<td>Principal Consultant</td>
<td>Neudesic, LLC</td>
</tr>
</tbody>
</table>
4.0 Data Requirements

4.1 Data Sources

<table>
<thead>
<tr>
<th>Server(s)</th>
<th>Source(s)</th>
<th>Target(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>SC-DB, Instance SC-DB\SARS</td>
<td>Saddleback SARS Database</td>
<td>Database: SARS</td>
</tr>
<tr>
<td>IVCSTS1</td>
<td>IVC SARS Database</td>
<td>Database: IVC</td>
</tr>
</tbody>
</table>

4.2 Dimensions

<table>
<thead>
<tr>
<th>Dimension/Structure</th>
<th>Source/Attributes</th>
<th>Description/Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td>DimStudent</td>
<td></td>
</tr>
<tr>
<td>Academic Calendar</td>
<td>DimTerm, DimTermPeriod, DimAcademicYear</td>
<td>MAP Appointment Date to Term date range using vtTermCounselingDateRange-TBD</td>
</tr>
<tr>
<td>Appointment Date</td>
<td>DimDate</td>
<td>5/12/2009, 2009 W18, May 2009, 2009</td>
</tr>
<tr>
<td>Counselor</td>
<td>DimCounselor</td>
<td>Counselor Name</td>
</tr>
<tr>
<td>Appointment Reason</td>
<td>DimAppointmentReason</td>
<td>Grad Check, Graduation Check, COUNCTR, Counseling Center</td>
</tr>
<tr>
<td>College</td>
<td>DimCollege</td>
<td>S, Saddleback College</td>
</tr>
</tbody>
</table>

4.3 Measures

4.3.1 Counseling

<table>
<thead>
<tr>
<th>Measure Name</th>
<th>Description/Source</th>
<th>Example/Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Count</td>
<td>Distinct Count of Appointment ID</td>
<td></td>
</tr>
<tr>
<td>Student Count</td>
<td>Distinct Count of SARS Student ID</td>
<td>There is a SARS and SIS Student ID because students can receive counseling prior to applying and getting a SIS Student ID</td>
</tr>
<tr>
<td>Duration</td>
<td>Appointment Duration in minutes</td>
<td>Stop Time - Start Time</td>
</tr>
</tbody>
</table>
Lessons Learned in Managing Projects

Planning Is Important
- Ask lots of Questions
- Identify who you are working with and wants to be involved
- Articulate your understanding of the objective or end goal for the requestor
- Document, document, document
- Timeline
  - Final deadline and
  - Intermediate deadlines

Communication
- Initial Meeting – keep notes and send it out to requestor soon after you have defined the request
- Schedule follow-up meetings so you don’t let a lot of time go-by
- Follow-up and regular emails/communication is important for the requestor to know the project is being worked on
Scenario:
Your Vice President of Student Services would like you to provide her a plan to assess student services and student engagement on campus. She wants to understand what reports her offices have and if they need to other data or reports to better evaluate services to students. She would like to have a plan from you by in two weeks.

How would you start to plan to fulfill this request? What questions would you need to ask? What steps would you take to develop this plan?

Identify the pieces in a project charter and project scope that would be important for this project.
Project Management Tools

- Survey Software that can make a request form

- Project Management Software (lots out there)
  - MS Project, SharePoint
  - Excel
  - Gant Charts
  - Monday.com
My Questions and Yours?

- What do you think will be useful in your office?
- What areas would you like to learn more about, if any?

- Questions for me?