



PROJECT MANAGEMENT | BEST PRACTICES

Project Management Principles

1. Vision and Mission

Every project or initiative should begin with the end in mind. Articulate the vision and mission of the project so the expected outcome or desired state, and how it will be accomplished, is crystal-clear to everyone.

2. College's Objectives

Establish a set of goals or objectives for the project. Is it being implemented to increase student enrollment or philanthropic dollars? Also, it's important to quantify the amount of improvement that is expected, instead of being vague.

3. Standards of Engagement

Establish who will be part of the project team. Every project should be clearly defined with a designated project manager or liaison. What will be the frequency of meetings? What are the meeting ground rules? Who is the project sponsor? Who will take notes and distribute project meeting minutes and action steps? All employees should use standardized tools and processes for managing projects (i.e. ProofHub, Project Charters, Briefs, Addendums, etc.)

4. Solution and Execution Strategy

Determine the most suited solution to resolve the issue you are working on. Then map out the execution strategy for implementing the solution. Identify who will do what, when, how, and why?

5. Organizational Alignment

To achieve organizational alignment (or buy-in), ongoing communication must be employed in-person during team meetings and or electronically via email. Communicate the goal of the project with stakeholders and team members to prevent the withdrawal of support, interest or engagement around the new initiative.

6. Measurement and Accountability

How will we determine success? Outline measurements for success in project charters, and use project management tools like ProofHub to keep team members updated and on task. A debrief and post-mortem is important to conduct after each project to discuss challenges and successes.

Project Manager Responsibilities

- Responsible for planning, organizing, managing, and communicating all phases of the project
- Ensures that all given objectives and responsibilities are properly documented, assigned and approved.
- Facilitates identification of project resource needs and project risks.
- Plans and manages project phasing, scheduling, and reviews.
- Facilitates communications with stakeholders.
- Facilitates and leads team meetings.
- Ensures that project documents are available to team members, and others, as needed.
- Creates and develops the following documents in collaboration with core team for approval by Project Sponsor and Stakeholders:
 - Project Charter**
 - Creative Brief**
 - Production Schedule (part of project charter)**
 - Debrief Addendum**
 - Agendas**
 - Minutes**

Liaison Responsibilities

- Provide the client with resources and contact information.
- Facilitate communications between the client and UMAC for new email newsletter Marketo builds.
- As a liaison, make sure the outside resource (UMAC, Creative + Communications, etc.) is available to take on additional work.

Components of an Effective Kickoff Meeting

- Before the kickoff meeting, email all participants the agenda along with the project charter template. Inform them that the group will go over the project charter during the meeting.
- Use the draft version of the project charter to help guide the kickoff meeting conversation around project expectations, goals, timeline, roles and responsibilities, and decision-making structure (who has final sign-off).
- Include a production team member if the project involves design/photo/video support. *All advancement-related projects with a design component must use templates and not customized design.*
- Confirm next steps at the end of the meeting,
- Send meeting minutes, including outlined action items, after the meeting.

Active Project Phase (Project Manager Duties):

- Send a follow-up e-mail with meeting minutes and the updated project charter.
- If a creative brief is applicable to the project, write the brief or delegate the content/creative lead to write the creative brief, and distribute it to the group.
- Communicate regularly about any updates that may adjust the project timeline.
- Schedule check-in meetings with working group members, clients and the project sponsor for reviews and approvals.
- Manage project timeline and milestones, ensuring team members are on schedule with deliverables.
- At the end of the project, make sure the person with final sign-off has approved the final product.

Debrief

- Schedule a debrief meeting with the working group and stakeholders within two weeks after a project completion.
- Email the group an agenda before the meeting.
- Use the debrief addendum to guide the conversation during the meeting.
- Send the group the finalized project charter with the debrief addendum after the meeting.