A PROJECT MANAGEMENT APPROACH TO ACHIEVING DBE/OJT GOALS

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INTRODUCTION

- Welcome & Introductions
  - Name, organization, role in DBE/OJT
- My Background
  - Twelve years as DBE program administrator (NCDOT and CRAA)
  - In 2013 launched Evolution Supportive Services providing D/W/MBE services, speaking and publisher of American DBE Magazine
THOUGHTS ON PROJECT MANAGEMENT

- A critical skill set for DBE/OJT program professionals
- You manage many projects but need a process
- A project management approach will help keep your sanity amidst numerous activities
- Project management is more than just tasks and techniques, it’s a way of approaching the work
- A project management approach is an efficient, organized, and transferrable strategy to manage program deliverables
- Civil rights professionals should consider PM training
Provide overview of basic project management concepts
Discuss how to incorporate project management concepts into DBE/OJT goal achievement
Share experiences, strategies, and best practices
Collaborate on better solutions and processes
Achieve greater success in meeting DBE/OJT goals
Project - A temporary undertaking performed to produce a unique product, service, or result
- Can be large or small
- Can involve many people or just yourself
- A project is different from a process or a program

Three components of a project
1. Specific scope - Achieve DBE & OJT Goal, improve collaboration, to document processes, communication
2. Schedule - Specific start & end date for the project
3. Resources - People, budget, information
FOUR STAGES OF A PROJECT

1. Starting the project
2. Organizing and preparing
3. Carrying out the work
4. Closing the project
Project purpose?..... Why are we doing this?
Project approach?..... How will we do it?
Project support and approval?...Who supports it?
Project documentation?..What will get done?
Project commitment?..When will it be done?
Creating a written project plan

- Document work to be done
- Create a timeline
- Determine project budget
- Identify needed resources
- Consider supporting processes needed
STAGE #3 - CARRYING OUT THE WORK

- Establishing the project team
- Engaging project support systems
- Performing the work
- Monitoring and controlling the work
- Progress reporting
- Create project results
- Communication with audiences
STAGE #4 - CLOSING THE PROJECT

- Assessing project results
- Obtaining approvals
- Transitioning team members from the project
- Closing financial accounts
- Conducing post-project evaluations
1. Information - Accurate, timely, and complete data
2. Communication - Clear, open, and timely sharing of information with audience
3. Commitment - Team members’ promise to produce results
5 PROJECT MANAGEMENT PROCESSES

- Initiating processes
- Planning processes
- Executing processes
- Monitoring and controlling processes
- Closing processes

- Starting the project
- Organizing and preparing
- Carrying out the work
- Closing out the project
1. INITIATING PROCESSES

- **Important Questions**
  - Should we do it? Yes - FHWA requirement, better collaboration, better & consistent results
  - Can we do it? Yes... Have needed information, communication and commitment

- **Project Approval**
  - Is leadership on board? Secretary/CEO approval and support?
  - Support and approval from your boss? Is your boss on board?...Do you have a champion?
  - Deputizing? Has project support been delegated and communicated by memo or announcement?
2. PLANNING PROCESSES

- Document Reason for the project
  - Achieve DBE/OJT Goal
  - Improve collaboration and DBE/OJT program
  - Provide opportunity to DBEs and OJT candidates

- Detailed description of desired result
  - Meet DBE/OJT goals
  - Provide opportunity to DBEs and OJT candidates
  - Internal collaboration between departments
  - Formalize DBE/OJT goal achievement process

- Note constraints to be addresses
  - Project team time commitments
  - Budget available for project
  - Bid results, operations staff, prime contractors
2. PLANNING PROCESSES (CONT)

- Make assumptions
  - Project letting schedule
  - TIP and other funding (TIGER, P3s, turnpike)
  - Major projects proceed
  - Prime contractor projects (OJT Alternate Program)
- Document all required work
  - DBE Goal- Contract goal setting, GFEs, outreach, compliance, payment reporting, communication, report creation
  - OJT - Goal setting, trainee enrollments, interviews, communication, report creation
PLANNING PROCESSES (CONT.)

- Breakdown of roles
  - DBE - Civil Rights, Operations, Proposal & Contracts, Preconstruction, Communications, Construction Unit

- Project schedule
  - Deadlines - FHWA reports due, board meeting schedule, Internal approval timeline
  - Progress meetings - Quarterly or monthly
  - Report due dates

- Resources needed
  - Information - Overall DBE Goal, OJT Goal, contractor revenues, letting list, disparity study, reports, IT, Finance/accounting, consultants
PLANNING PROCESSES (CONT.)

- Consider risk management/uncertainties
  - Bid letting changes, staff changes, prime contractor changes
- Build a communication plan
  - Audience - Legislators, board members, executive staff, senior staff, internal staff, FHWA, professional groups, DBEs, primes, Department of Labor
- Create quality control methods
  - Tracking, monitoring, control, data accuracy, report writing, communications
3. EXECUTING PROCESSES

- Preparing
  - Make role assignments to team members
  - Introduce project and team members
  - Give & explaining tasks to team members
  - Define how team will perform its essential functions
  - Set up tracking and monitoring systems
  - Announce project to the organization and audience
3. Executing Processes (Cont.)

- Performing
  - Execute project tasks
    - Set contract and OJT goals
    - Enroll, interview, track OJT trainees
    - Bid projects
    - Administer projects
    - Track results
    - Good faith
    - Communications
  - Assuring quality
  - Managing team members
  - Developing of team where needed
  - Sharing information
4. MONITORING & CONTROLLING PROCESSES

- Compare results w/ plans
  - Ongoing review
  - Progress meetings
  - Review progress reports

- Making adjustments as needed
  - Revise plans
  - Revise DBE/OJT goals as project proceeds

- Fixing or minimizing problems

- Communication
  - Keep leadership engaged
  - Minimal surprises to team, leadership or audiences
5. CLOSING PROCESSES

- Final approval of project results and reports
  - Leadership
  - FHWA

- Closing project accounts
  - Contracts, financials (WBS element)
  - Consultants

- Team Transition
  - Formally decommission team members
  - Awards and recognition

- Post-project evaluation
  - Review achievements
  - Note lessons learned
THE PROJECT MANAGER’S ROLE

- Be proactive (lead)
  - Get needed information, follow the plan, involve others, Identify issues/risks, share info, document, ask questions, commit to success

- Ward off excuses for not following a PM approach
  - No time, PM approach unnecessary, too structured

- Avoid shortcuts
  - Skipping planning, taking it for granted year to year

- Stay aware of new challenges
  - New projects, new people, no direct authority
1. Are you more concerned about being everyone’s friend or getting a job done right?
2. Do you prefer to do technical work or manage other people doing technical work?
3. Do you think the best way to get a tough task done is to do it yourself?
4. Do you prefer your work to be predictable or constantly changing?
5. Do you prefer to spend your time developing ideas rather than explaining those ideas to other people?
11 Questions for a P.M.

6. Do you prefer to work by yourself or with others?
7. Do you handle crises well?
8. Do you prefer to work by yourself or with others?
9. Do you think you shouldn’t have to monitor people after they’ve promised to do a task for you?
10. Do you believe people should be self-motivated to perform their jobs?
11. Are you comfortable dealing with people at all organizational levels?
Incorporating a project management approach to achieving DBE & OJT goals can be an efficient and effective strategy to improve the results of your program efforts.

Effective project management requires taking time to gain support and approval, create a project plan, build a team, assign roles, and monitor results. However, the benefit to these actions will be greater engagement from leadership and audiences, better performance, and a documented process that can be delegated/transferred to others when necessary.
A leader is best when people barely know he exists, when his work is done, his aim fulfilled, they will say: we did it ourselves.

Lao Tzu