



Project Management Guidelines & Best Practices

Project Management Philosophy

As UMBC continues to advance the goals and priorities outlined in the Strategic Plan for Advancing Excellence and the Strategic Enrollment Plan, it will be imperative that we employ best practices in project management that support effective and efficient planning and development. Well-defined approaches to project management ensure that we are not only good stewards of institutional resources but that we are able to be good partners as we collaborate with others (both within and outside the UMBC community) on the planning, development and execution of important initiatives. Further, clear and consistent project management protocols help facilitate change management and promotes innovation. Finally, project management is an essential workforce skill and demonstration of proficiency in and experience with project management increases one's marketability and opportunity for growth and advancement.

The guidelines and protocols that follow detail the standards and expectations for project management in Enrollment Management:

What is a Project?

A project is defined as a sequence of tasks that must be completed to attain a certain outcome. Further, according to the [Project Management Institute](#), the term Project refers to “any temporary endeavor with a definite beginning and end”. Depending on its complexity, it can involve a single person, entity or hundreds and include community members both within and outside of the department. While we often think of technology-driven initiatives as projects, projects can be non technical in nature. For example, event planning, school partnerships, and student success initiatives are all considered projects in Enrollment Management.

Additionally, in Enrollment Management, a project includes one or more of the following:

- An institution-sanctioned initiative sponsored by a Dean, VP, Provost or President, supporting the university mission (i.e. teaching, learning and research)
- An external system, state or federal mandate
- Engagement of other units within Enrollment Management, the University or a third party
- Requires the allocation of additional resources - personnel and/or financial beyond the resources required for operational duties

Project Planning Expectations and Standards

Successful projects require thoughtful planning. The following guidelines represent best practices endorsed by the Project Management Institute (PMI)*, and adopted by Enrollment Management, for facilitating projects from initiation through completion.

Steps for developing and executing project planning:

1. *Establish the Project Charter*

The project plan begins with a well-defined project charter. Establishing the project charter will allow for the capture of specific project information and parameters that will aid in project evaluation. Minimally, the charter should include a brief written description and outline of the project that includes a clear statement about what problem are we trying to solve or what opportunity we are pursuing, as well as the project scope, stakeholders, timeline and budget and other resource requirements.

The project charter should be provided to the direct manager/supervisor and unit director for review and consideration before initiating. After unit director-level review, the project charter should be available to all project participants.

2. *Initiation and Planning*

Once a project charter is approved by the unit director, it formalizes the existence of the project. Next step involves defining essential roles and responsibilities.

3. *Define Roles and Responsibilities*

All projects, minimally, should include the following roles:

Project Sponsor

Have a designated sponsor at the university leadership level (i.e. President, Provost, Vice President, Vice Provost) that has committed the resources necessary to support the project planning, execution and sustainability.

Ex: For the S/U Grade Option project, an academic policy initiative to better support students experiencing academic difficulty in a course, Katharine Cole, Vice Provost and Dean of Undergraduate of Academic Affairs, served as the project sponsor.

Project Lead(s)

A project lead is responsible for execution of the project plan. The project lead may be responsible for specific aspects of a project or the entire project. They may be responsible for developing the project plan, managing a small team, general oversight of the project, and reporting on progress to the sponsor and other higher-level management. In some cases, the project may warrant more than one project lead (i.e functional lead, technical lead).

Ex: During the implementation of the Smart Panda Transcript Management System, The Director of Admissions, serving as the project lead provides vendor coordination, team goals regarding testing requirements, general project oversight and provides reports on the project status to other EM and DoIT personnel.

Project Manager

A project manager is responsible for the day-to-day tactical execution of project tasks and monitoring of the project efforts including regular updates of the status of the project to the project lead. This role may be assumed by the project lead.

Ex: During the Articulation and School Partnerships on-going project, the Associate Director for Transfer and Targeted Populations, and Partnerships, serving as the project manager provides technical assistance to department faculty to build out the articulation agreements. The Associate Director also tracks, monitors and updates the status of the agreements.

Project Team Members

Individuals responsible for doing the work associated with a project will be members of the project team. Each team member shall have a clearly articulated and defined role. Roles should include, but are not limited to

- Recorder/Note taker
- Subject matter expert
- Business analyst
- Resource manager
- Quality assurance/Tester
- Technical support

Ex: For the Flexible Class/Term Scheduling project, which utilized a third party consulting group and project management team, to expand our scheduling options, the Associate Registrar for Systems served as one of the subject matter experts.

Project Stakeholders

Stakeholders are campus community members who will be affected by your project at any point in its life cycle, and their input can directly impact the outcome. Stakeholders can be within or outside Enrollment Management. Keep in mind, students are one of our primary constituents and should be recognized as an important stakeholder. Other stakeholders include faculty, staff, alumni, and parents. Additionally, in accordance with UMBC values, it is important to include different voices and perspectives (i.e. gender, race/ethnicity, social-economic) to ensure the success of the project and that our work represents the diversity that is UMBC.

Ex: For the Assign Advisor/Advisee project, which automates the assigning of professional and faculty advisors to student advisees, stakeholders include academic department advisors, undergraduate program directors and department chairs.

4. Project Initiation Meeting(s)

An initial gathering of Executive Sponsor, Project Lead, and Project Manager to review the project charter and broadly discuss the implications of the project.

5. Complete the Detailed Project Plan

The designated Project Sponsor, Project Lead and Project Manager will build out the project plan, including detailed written description of estimated cost, scope, tasks and timeline (milestones), and an assessment and evaluation plan. The detailed project plan must be available prior to the start of the project.

6. Project Kickoff Meeting

The launch meeting is an opportunity to review the detailed project plan, roles and expectations. Every effort should be made to include identified project members in the initial launch meeting.

7. Execution, Monitoring and Control

Once the project commences, the project manager should monitor progress and update the project status regularly, including:

- Tasks: Which tasks are completed and which are outstanding?
- Timeline: Have we achieved the desired milestones?
- Scope: Is the project still within the initially defined scope?
- Risks: Have any new risks been identified?
- Budget: What expenditures have occurred and are they within the established budget?
- Communication: Are you communicating with the project sponsor, team members and stakeholders on a regular basis?

8. *Assessment and Evaluation*

The health of the project requires a thoughtful and clearly defined assessment and evaluation plan. The plan should include well-defined metrics. Metrics might include quantitative measures, such as cost, time and resource utilization, as well qualitative measures, such as user satisfaction. Project management assessment and evaluation should drive continuous improvement during the project and post-project completion. Additionally, major observations, findings and lessons learned should be reflected in the overall EM Assessment Plan.

9. *Project Completion*

A project that has achieved the desired outcomes as articulated in the project charter, shall be deemed complete. Completed projects must include:

- Business process documentation
- Lessons learned that will improve future projects
- Designated functional team member that will sustain the effort moving forward
- Must include project closeout report assessing overall project success and team performance

Training, Development and Evaluation

Project Management is an interactive process. As such, investment in training, development and evaluation is critical to continuous improvement and to ensuring a high standard of project management practice across the organization.

Training and Development

Designated Project Managers and other key project team members shall be proficient in the principles of effective project management as defined by the [Project Management Institute](#). Project Managers are expected to stay abreast of the ever-evolving standards of project management. Training will be provided based on individual staff needs, which might include online self-paced modules, conferences and workshops, or in-person classroom training. Though not required, staff serving in PM roles are encouraged to seek full project management certification. Staff are encouraged to work with their immediate supervisor to devise a training and development plan.

Feedback and Evaluation

Project management is a learned skill that requires ongoing and continuous improvement; as such, the project manager's should be provided an opportunity for regular routine feedback, including what is going well, where there may be challenges and any resource needs.

Additionally, supervisors should utilize the annual Performance Management Process (PMP) to acknowledge and document the PM's role and contributions as well as areas for improvement.