



# Practical Project Management

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Consultant People, LP

6/29/2006

**Project management for Community Hospitals**  
**Part I**  
By Bruce Hall

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## Executive Summary

Formal project management has become a core component of most CIOs' toolkit. Unfortunately, most CIOs in smaller hospitals rarely have the resources to be able to staff a formal project management office. This need not prevent you from using practical project management methodologies.

The word practical is used because you will need to pick and choose elements of a formal project management process that make sense for your environment and project. You will need to balance resources and time constraints with project stresses caused by variables beyond your control. Getting the right balance will help you achieve a practical level of project management. The intent of this article is to suggest a method that you may wish to consider as you plan your next project.

## Business Challenge

Good project management is an art, not a science. It is not a one-size-fits-all endeavor. You need to look at the variables involved and fit the management process to the project. If your project is going to take four weeks to complete, does it make sense to spend five weeks on a detailed project charter and project plan?

On the other hand, small hospital CIOs should not overlook the benefits of utilizing some level of formal project management. Strike a balance, and remember: the purpose of project management is to improve and facilitate the process, not to impede it.

## Project Management Balance

Balance is achieved when we have similar weights or forces on each side of the project management decision. On one side we have the full suite of project management activities and on the other side are variables that will bring stress to your project. We start by looking at the variables and deciding how much stress each will contribute to this undertaking and how much project management will be needed to help mitigate it.

Finding a practical approach begins with evaluating stress variables:

- **Risk** – How much is being invested in this project and how visible is it to the community? Does the project involve patient care?
- **Project acceptance** – Is your project controversial? Do you have demonstrable senior management support? How involved were the end users in selecting the solution and do they believe in the project? Are the appropriate people involved?

- **Project staff size** – How big is your project? How many people are affected by it? How large is the project team?
- **Project length** – Do you expect the project to last a few months or will it be longer?
- **Environment** – What experience have you had with projects at this organization in the past? Have they been well accepted or are there things that could have gone better? What is the attitude toward change?

Project management activities can be excellent antidotes to stress variables. Generally, project management is thought to consist of 5 phases. The following chart defines each phase and some of the basic activities that occur and their outputs, using language that we all can understand.

## Project Management Phases

<i>Phase</i>	<i>Activity</i>	<i>Output</i>
<b>Getting Started</b>	<ul style="list-style-type: none"> <li>▪ Define what this project is and what the goals are</li> <li>▪ Gain senior management and end user support</li> <li>▪ Define measurable objectives</li> </ul>	Project Charter of varying size from one page Memo of Understanding to a full project charter document
<b>Plan and Organize</b>	<ul style="list-style-type: none"> <li>▪ Set appropriate expectations</li> <li>▪ Determine realistic time frames</li> <li>▪ Define the project team and roles</li> <li>▪ Break the project down into logical steps</li> <li>▪ Select milestones for longer projects</li> <li>▪ Build a communications plan</li> </ul>	Project Plan defining time lines and responsibilities. May be a simple spreadsheet or full detailed Microsoft Project plan with detailed Work Breakdown Structure
<b>Execute</b>	<ul style="list-style-type: none"> <li>▪ Manage the project or delegate depending on the effort required</li> <li>▪ Follow the plan and adjust as necessary</li> <li>▪ Celebrate milestones on longer projects</li> </ul>	Project completion
<b>Manage, Control and Communicate</b>	<ul style="list-style-type: none"> <li>▪ Keep an issues log</li> <li>▪ Create a change control process</li> <li>▪ Write status reports on longer projects</li> <li>▪ Follow your communications plan</li> </ul>	Documents that are evidence of good project management appropriate to the level of control suggested by the variables
<b>Complete</b>	<ul style="list-style-type: none"> <li>▪ Summarize history of the project including mistakes made and recommendations for future projects</li> <li>▪ Take and give credit for success</li> <li>▪ Celebrate</li> </ul>	Project completion report

When you have thought about the variables and have some idea of the complexity of your project you are ready to begin a practical approach to deciding how to manage it. Below is a matrix showing the variables on the left with phases across the top. Once you have decided the level of stress each variable introduces to your project you can assign a level of effort needed to mitigate and manage that variable. Some of the variables will trump the others, such as risk.

For example, if risk is low to moderate but the project is large in terms of staff involved, the level of management involvement during the execute phase will be still be high but you may only need a Memo of Understanding instead of a full project charter in the Getting Started phase.

## Project Stress Matrix

To find out the level needed in your project highlight each row to the right of the yellow column that best describes the level of stress for each variable. Follow each Phase column down to see which highlighted box has the greatest management effort. Whichever one is highest will be required for that phase in order to mitigate the corresponding stress variable, even though it is not needed for some of the others. Keep in mind which variables are the dominant stress factors. This will help you tailor the emphasis in each phase to better address the project's stress areas.

# Model

		<b>Phases</b>					
		<b>Getting Started</b>	<b>Plan and Organize</b>	<b>Execute</b>	<b>Manage, Control and Communicate</b>	<b>Complete</b>	
<b>Variables</b>	<b>Risk</b>	High	Detailed Project Charter	Detailed Plan	High Level of Management Involvement	Hi Level of Control High Effort Communication	Formal Completion Process
		Low	Memo of Understanding	Summary Plan	Moderate Level of Management Involvement	Summary Documentation Moderate Effort Communication	Informal Completion Process
	<b>Project Acceptance</b>	Weak	Project Charter emphasizing goals	Summary Plan	High Level of Management Involvement	Summary Documentation High Effort Communication	Formal Completion Process
		Strong	Memo of Understanding	Summary Plan	Moderate Level of Management Involvement	Summary Documentation Moderate Effort Communication	Informal Completion Process
	<b>Project Staff Size</b>	Large	Memo of Understanding	Detailed Plan	High Level of Management Involvement	Moderate level of Control and High Effort Communication	Formal Completion Process
		Small	Memo of Understanding	Summary Plan	Moderate Level of Management Involvement	Summary Documentation Moderate Effort Communication	Informal Completion Process
	<b>Project Length</b>	Long	Project Charter with Staffing Plan	Detailed Plan	Moderate Level of Management Involvement	Summary Documentation Moderate Effort Communication	Formal Completion Process
		Short	Memo of Understanding	Summary Plan	Moderate Level of Management Involvement	Summary Documentation Moderate Effort Communication	Informal Completion Process
	<b>Environment</b>	Negative	Project Charter	Summary Plan	High Level of Management Involvement	Hi Level of Control High Effort Communication	Formal Completion Process
		Positive	Memo of Understanding	Summary Plan	Moderate Level of Management Involvement	Summary Documentation Moderate Effort Communication	Informal Completion Process

## Example

Let's try out this technique using the Project Stress Matrix below on the following example. Lee is CIO at your local community hospital. He has an IT staff of 12 to run a network, maintain 800 devices and support a full suite of MEDITECH Magic modules. Lee's hospital cannot afford a full time Project Management Office or Project Manager. Lee has responsibility for managing all IT projects. Recently his nursing director approached him about implementing electronic documentation. The request was also made at the senior leadership level and received approval and funding. Lee must now organize the project. He uses the Project Stress Matrix to help evaluate where and how he can best utilize his and his staff's time.

First he selects the stress level indicator in the yellow column for each variable. The project does involve patient care but he feels that the risk in this project is low to moderate since they have a paper process that works fine and he has plenty of time to implement the project and can do so incrementally, one department at a time. Since the idea was brought to him by the Director of Nursing who says the nurses are in support, project acceptance seems to be strong. The project staff would be small and probable consist of a 5-member core team, an IT clinical analyst and Lee. Implementation will take at least a year and half to reach all the departments of the hospital. Lee has completed several other projects at the hospital that have gone well and he enjoys a good relationship with the nursing staff. Senior Leadership is in favor of the project and the CEO spoke to Lee about how important she feels this project is to the hospital.

Lee takes this information and selects a stress level for each variable and highlights the row in blue. He then looks at the column for each phase of the project and selects the box in blue that has the highest project management effort and marks it in pink. In this case they are all on the same row. The matrix suggests that he develop a project Charter with staffing impacts due to the length of the project. Because it is a long project, a detailed plan needs to be developed with steps and milestones in order to manage and track progress.

The matrix also suggests a moderate level of management involvement in Project Management. Lee ponders this suggestion and decides to put his clinical analyst in charge of the project. The analyst will provide him with bi-weekly progress reports, keep an issues log and develop a monthly newsletter devoted to the project. When the project is complete, they will together write a formal end of project report that looks back at what has been accomplished, makes suggestions for future projects and gives credit to the core team for their hard work.

Lee takes the completed Matrix and Project Management ideas to his boss and receives approval to begin the project and include his ideas in a Memo of Understanding. Everyone feels the project is off to a good start and that Lee has developed a practical balanced solution to the project's management needs.

## Example Project Stress Matrix

		Phases					
		Getting Started	Plan and Organize	Execute	Manage, Control and Communicate	Complete	
<b>Variables</b>	<b>Risk</b>	High	Detailed Project Charter	Detailed Plan	High Level of Management Involvement	Hi Level of Control High Effort Communication	Formal Completion Process
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## Conclusion

Project management in the smaller hospital may take up more of your time than you want it to. You are likely to be a hands-on CIO putting out fires and you have little extra time, but if done with reason and balance you can use these tools to help you as a manager to keep your projects on track. Before your next project, learn more about the five phases of project management and then try applying the Project Stress Matrix to decide how much and what type of project management is right for you.

## More Information

The essential source for project management fundamentals is the Project Management Institutes ([www.pmi.org](http://www.pmi.org)) Project Management Book of Knowledge (PMBOK).

The APMC WEB site [www.allpm.com](http://www.allpm.com) is a good location for articles on project management.

For the latest information about our services, please contact us:

Consultant People, LP

396 W Main Street

Lewisville, Texas 75057

Email: [info@cpeople.org](mailto:info@cpeople.org)

Website: [www.cpeople.org](http://www.cpeople.org)

Tel: 469-948-4000