2009

PROJECT MANAGEMENT PRINCIPALS

Building your Foundation in Project Management

A conceptual realistic course, that focuses on practical applications of how to start off your project. The course will provide an overview of understanding how to succeed at the job.

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Course Title: Project Management Principals

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Duration: 8 hours

INTRODUCTION:

The complexity associated with government contracts requires the expert training of a qualified contracts attorney, familiar with the applicable federal and corresponding state statutes. Now combine this with project management. That is exactly what this manual has attempted to accomplish.

The course presented herein, represents a "snap shot" of terms, conditions and language that should be basic knowledge for any project manager. The course familiarizes the student with "predicates" that activate and or trigger conditions incorporated within the body of the contract.

As a project manager, it is imperative that you have some type of foundation in contract management, and be familiar with how to manage your respective project. It is unrealistic to expect a project manager to be responsible for a project, when they don't have the basic building blocks of project management. Aside from representing your interest, the company accepts the vicarious liability of placing an individual in a position, without properly equipping them. This jeopardizes your bond and ultimately your bottom dollar.

The course provides a basic understanding coupled with a conceptual approach towards project management principals, applications and contract management. It is the initial step that employers should take, regardless of the experience level of the employee. When working on a project, especially outside of the United States, every manager on your site needs to be familiar with certain aspects of the contract and contractual protocols associated. This lesson plan is an organized attempt to address that issue.

The content within this manual does not provide a complete definition that is not the intent. It is a guide for the instructor, who strives to stimulate the creative thinking of the student.

UNDERSTANDING THE DIFFERENCE BETWEEN GOALS AND OBJECTIVES:

Remember:

A goal, is a broad statement of what the program, course or curriculum anticipates accomplishing.

An Objective, is a given, specified target, specific in nature.

Goal:

In developing this tutorial, concepts, mechanisms, and realistic applications established the president and subsequent direction. Likewise, student(s) participating in this course are anticipated to develop a peripheral understanding of basic project management characteristics, synonymous with project management skill sets.

The initial presentation, will focuses on conceptualizing a "*real project*" then moving forwarding, getting ready to implement. Students will not be required to take notes, it will be provided for them, at the end of class. Instead, the emphases will be on motivating the student, or stimulating the creative "*juices".* Interaction and common sense will determine if you made the right selection.

Regardless, understanding the importance of documentation, and timeline management will be paramount in the successful outcome of your project. Again, these are part of the initial steps in project management principals.

Student(s) are anticipated to come away with a broader perspective in project management. Firmly grasping the principals presented here and applying them in a uniformed and constructive manner, thus reducing the potential and subsequent liability ramification normally associated.

Objective:

The instructor will be provided with a focused understanding of the respected student(s) understanding and subsequent knowledge of contracts, business management, interpersonal communication skills, experience and desire. Likewise, the student(s) will develop an understanding of the instructor(s), their knowledge, and experience(s). Once established, development of the presentation can be a mutually beneficially experience. Remember, these are the people you're going to be working with. Developing a repo with them begins here. Yes, dividing lines can and should be established at to the *"boss"* however, the most important element in any business is its personnel. They can and have been known "*to make or break a company".*

Consequently, your organization and presentation skills will be centered stage. The objectives presented are simple:

- Determine initial skill sets;
- Recognize individual attributes;
- Determine experience levels;
- Recognize receptive attitudes;
- Understand the developmental phase(s); and
- Provide an informative (8) hour course, that the student can understand, and apply.

COURSE MATERIALS:

- Sample Gantt charts;
- Sample Earned Value Management EVM tools;
- Copies of all applicable contracts and attachments;
- Copies of all applicable statutes, Federal Acquisition regulations FAR, Code of Federal Regulations CFR Title 48, Defense Acquisition Regulation DFAR, Armed Services Procurement Act, Compensation in Contracting Act, and the Air Force Acquisition Regulations AFAR
- Overview of the Foreign Corrupts Practices Act,

NOTES:

UNDERSTANDING THE FOUNDATION OF GOVERNMENT CONTRACTING: Brief overview

The below (6) federal statutes make-up the foundation of government contracting:

1- Federal Acquisition Regulations (FAR)

2 Code of Federal Regulations CFR Title 48

3- Defense Acquisition Regulations DFAR

4- Armed Services Procurement Act

5- Compensation in Contracting Act

6- Air Force Acquisition Regulations AFAR

NOTE:

Discuss the difference between the statutes

NOTIFICATION OF THE CONTRACT AWARD:
Brief overview

Management's Responsibility) Discussion only:

- Ensure that an internal, comprehensive review of your proposal is immediately done, prior to meeting with the client. This should be conducted by a group, familiar with the project. This should include at a minimum:
- Focus on the budget, line item review all categories;
- Determine if the client will require a Schedule of Values, if so further verification of figures and written estimates will be required;
- Ensure that written, dated, and signed supply agreements are secured;
- Separate each phase of the contract, cross-referencing budgetary line items;
- Identify all related general & administrative (G&A) line items;
- Make sure that plans, specifications and locations are defined and no ambiguity surrounding them exists;
- Make sure submittal information is clear and corresponding procedure well defined;
- Review all payment terms, and conditions;
- Ensure that corresponding subcontracts have been properly vetted;
- Verify that written subcontract agreements are in place, and individual responsibilities identified;
- Review terms and conditions, look at language in the body of the contract and

attachments, specifically, (liquated damages, termination by conveyance, prohibited activities, reporting procedures, jurisdictional authority, arbitration, due dates, payment procedures, retainage, bonding, if applicable, termination clauses, penalties, force majeure, delays, escalation of penalties, appeals, stoppage of work, downtime, etc.

- Simultaneously with the contract review, a separate group of individuals will ensure that the Gantt chart illustrating Earn Value Analysis (EVA) will be comparing notes and verifying dates. It's important to realize that the production of an "S" chart demonstrating cash flow is imperative with monitoring the budget;

- After the above information is reviewed and remarks made, the entire contract should be put in a three ring binder and indexed. All questions, concerns and ambiguous statements on the contract document, should be highlighted with sufficient space to make notes for clarification, and corresponding signatures from all parties;

NOTES:

SELECTION OF A MANAGEMENT TEAM:
Discussion with class (Explain to class the process)

This section assumes; that the key management staff for the project has not been selected. What needs to be done?

- Get your Project Manager onboard as soon as possible; (**Overview only**)

- The Project Manager will select and hire his management team. Identify individual areas of expertise;

- Allow your Project Manager to take the lead. He should be made to bear the responsibility of organization and mobilization. If he can't do it here, he won't be able to function once the project starts. This is basically his proving ground. Watch, listen and observe. You should be able to tell by his actions if he is competent and up to the task. Its better he fails here, then in the field, in front of the client. (**Overview only**)

- All bounder copies of the contract and attachments should be provided to him. This includes the budget, and all subcontractor agreements. An informed Project Manager is an effective Project Manager. All of the binder will be numbers, professionally bounded and indexed. Incorporated inside the book will be the following internal forms. The Project will provide copies of the binders to individuals he deems necessary.: (**Overview only**)

  a) Non-disclosure agreement restricting disseminating any part or portion of the information in the contract, without prior written authorization from corporate;

  b) A letter acknowledging receipt of the bound contract and attachments. Attesting to the fact you received this information, and will familiarize yourself with the information.

- Provide all contact information at this time to the Project Manager, an identify any areas of concern;

- Familiarizing the class with the contract, policies and procedures and individual Responsibilities;
- Review site plans and specifications;
- Discuss vendors, and subcontractors (what role they will play)
- Reporting protocols;
- Accommodations and travel;
- Identify core competencies in individuals;
- Discuss challenges and opportunities with the contract;
- Familiarize staff with the scope of work, and type of contract;
- Customs and environment traits;
- Requirements;
- Site safety;
- Required project documentation;
- Security arrangements;
- Personnel will distribute corporate personnel forms;

- Review the Gantt chart, explain what it means;
- Discussion on CAC cards, and travel documents;

IDENTIFYING STAFF'S RESPONSIBILITY:
Discussion with class

- Identify core responsibilities, and openly discuss them, with the management team;
- Provide a clear and definitive "*picture*" of the chain of command;
- Distribute contract manuals to designated team members;
- Provide a historical perspective of the contract and the administrating agency;
- Discuss the goals and objectives of the program;
- Review the plans, specifications, and scope of work with the team;
- Provide feedback to corporate on significant findings, based upon the teams involvement;
- Provide written and defined job descriptions;
- Review policies and procedures;
- Designate a person to collect, assemble and maintain an accurate accountability of all contract documents. This should be done on a continuous basis. All contact with the COR, regardless of the mode of travel, telephone, fax or email should be documented.
- Review the dissemination of information policy, and how information is to be transmitted, Specifically, transmittals;
- Likewise, transmittals should accompany all outgoing correspondence. The custodian of these records should incorporate a detailed tracking log to organize the

correspondence file;

- Management should prepare or incorporate existing policies and procedure to address transmittals;

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- Controlled access to the COR, this ensures that only specified information / controlled information is relayed;
- Instill that all government contact must have strict adherence to internal controls, and supervision. Maintaining control over documents reduces liability and establishes a strong foundation for any recourse;
- Cross shredders, and secured email accounts will be utilized when applicable; and
- Management's responsibility with subordinates.

Define the project (Life Cycle) (Key understanding for class)

- Define objectives, assumptions and constraints;
- Gather all documentation;

Plan the project activates (Keep it broad at this point)

- Define phases, milestones and tasks
- Define responsibilities of the project activities
- Estimate the activates and durations;
- Define the logic and create relationships between each activity;
- Setup coding based on physical locations, phases and responsibilities;

- Plan and procure resources
- Create estimates, and identify requirements
- Start staffing and procurement process taking into consideration all leads time requirements;
- Schedule refinement
- Add the details to the schedule with activity lengths 2 – 3 weeks;
- Create layouts, filters and reports;
- Resource load the project;
- Setup data collection processes;
- Setup updating, projecting, and report process of schedule;
- Create and save a baseline schedule;

Create a plan file folder structure on a different computer (block-up server) for daily, weekly schedule backups;

Create / revenue curve and cost curve

- Integrate with job cost systems;
- Identify and plan risks, opportunities, and quality;
- Setup communication and security methods including correspondence and file transfers;
- Review and fine tune the schedule and all plans;

Track and manage your project

- Track progress;
- Collect data to update the schedule (activities % complete, resources, procurement)

Manage and schedule

- Update the schedule;
- Analyze the identify problems;
- Track all dates and critical paths;
- Review logic- constraints, dependencies;
- Compare schedules for actives' ahead or behind schedule (current to previous weeks baseline)
- Prepare status reports (progress, projections, and earned value manage resources);

Manage resources

- Track resource progress-actual versus planned
- Balance workload;
- Identify and resolve resource problems, risks and opportunities;

Manage costs

- Review cost variances and identify problems, risks and opportunities;

Manage scope

- Identify and adjust schedule for change in scope;

Manage risks and opportunities

- Identify and respond to new risks and opportunities

NOTES:

MOBILIZATION:

- Define the budget which is incorporated into the EVA and corresponding "S" chart, illustrating the proposed timeline schedule for the entire project. This is a very detailed chart. Regardless, what anyone's says, this chart can and has been the mechanism for measuring your failure or success;

- Identify the "*phase in"* of staff to coincide with the Gantt chart, and corresponding "S" chart. Remember, coordinating deployment of resources, logistics and personnel can and should be strategically planned and coordinated, in order to maximize cost related expenditures. Management with have a detailed deployment schedule, which may at times become a *"living document*" subject to change;

- Identify all subcontractors, vendors and suppliers. Incorporate them on a master tracking log, which will be identified on the Gantt chart. A three-ring binger should be make as a back-up listing contact numbers, contracts, prices, and any independent notes;

- Depending upon the project, ensure that you have accurate plans, specifications and task order(s);

- Have all logistical operations and support mechanisms verified. Operations should have a detailed list (mobilization / deployment list) containing contact numbers and key personnel available;

- Computer software and IT personnel should be made aware of geographical conditions to ensure that they have sufficient supplies necessary to establish secured connectivity;

- All communication equipment will be established, on initial arrival;

- Utilize Appendix 1-A form for detailed “formatted” mobilization forms; and
- Utilize Appendix 1-B form for initial team member deploying.

NOTES:

Appendix 1-B **(Sample)**

Airfare	**NOTES**
Name	
Departure location	
Departure time	
Airlines	
Flight number	
Arrival time	
Arrival location	
Assigned pick-up personnel	
On-site contact numbers	
Logging	
Name	
Physical address	
GPS Coordinates	
Personnel assigned	
Transportation	
Types of vehicle	
Number of vehicles	
Identification of vehicles	
Rally point of vehicles	
Meeting with Subcontractor(s) / Vendor(s)	
Time & Date	
Location of meeting	
Individual(s) attending	
Site location	

Meeting with COR	
Review plans, specifications	
Site Inspection	
Map out route	
Identify points of importance	
Identify egress points from the compound	

NOTES: