

2008

PMI® RESEARCH CONFERENCE

DEFINING THE FUTURE OF PROJECT MANAGEMENT



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A Critique of the PMI Post-Disaster Rebuild Methodology

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SOFT SYSTEMS USE

The primary use of SSM is in the analysis of complex situations where there are divergent views about the definition of the problem

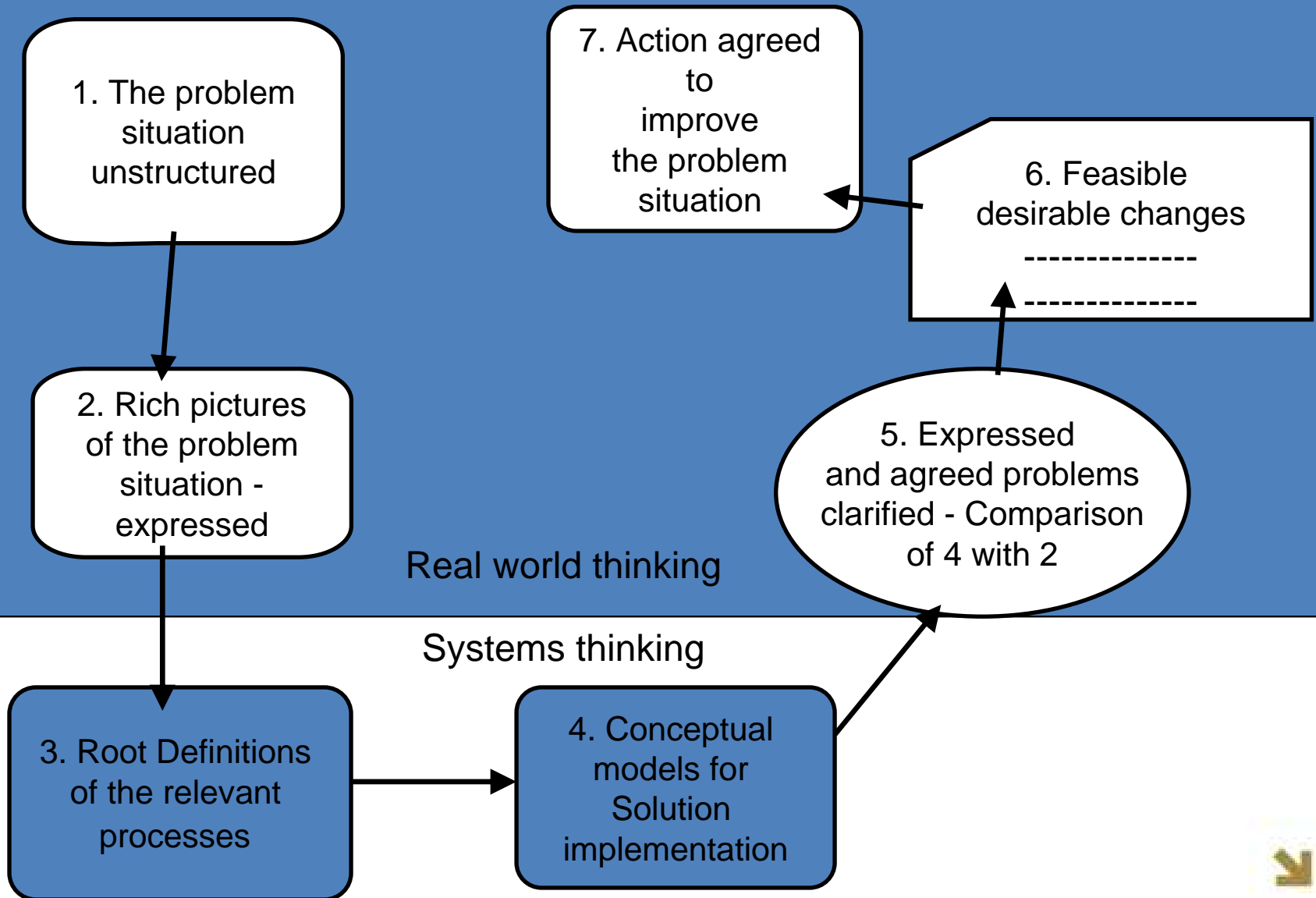
soft problems

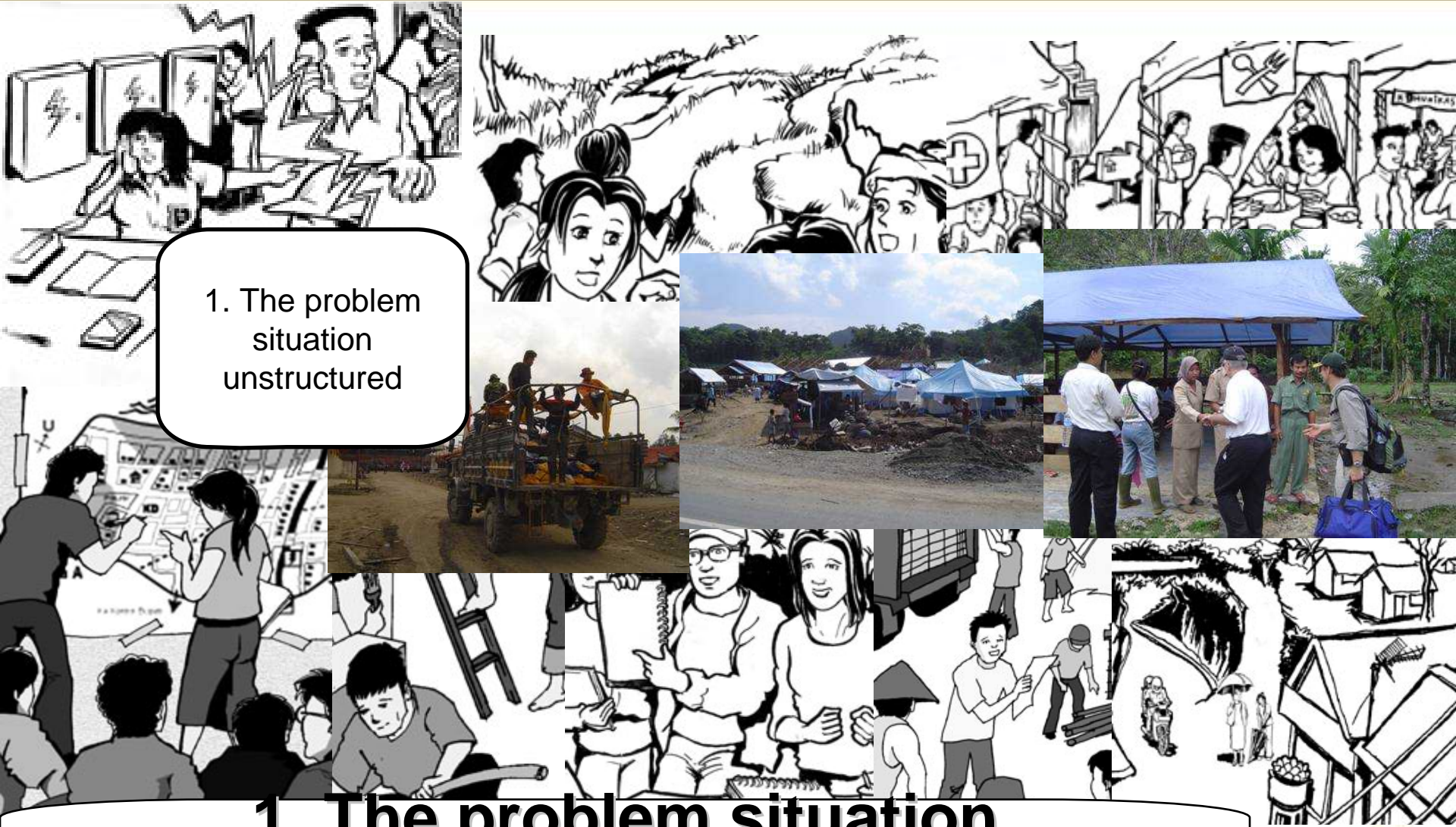
- How to improve health services delivery (Peter Checkland extensively used SSM in improving the work practices of NHS in UK)
- How to manage disaster planning;
- When should mentally disordered offenders be diverted from custody?
- What to do about homelessness amongst young people?



SOFT SYSTEMS METHODOLOGY

PMI® RESEARCH CONFERENCE
DEFINING THE FUTURE OF PROJECT MANAGEMENT





1. The problem situation unstructured

1. The problem situation unstructured





Find reliable people in local community

Assess & Develop Trust

Stakeholders

Work with empathy in with local community / donors / NGO's / Govt.

Find out how effective leadership is and what is best for community

- Define / Manage feasible plan together agree expectations to sustainable outcome
- Need good project scoping, planning, systems, engineering, cost & quality control

Vision Shared
Communicate

Key people & systems should have practical PM, find balance in culture

"Westerners have heart and talk which is bigger than the hand that follows"

Achinese saying, Logistics? Audit?

Communicate vision / agreed goals effectively, regularly and reliably
NGO's should not come with their fixed agenda and over promise but manage expectations together with community and donors / governance

Practical Plan
Fairness / perception / good judgement/ practical resolve

Need systemised project system – should be “super cut and dry”, simple & effective at all levels

Plan with practical experience and input to manage but with very tight control to minimisation corruption and enable outcome workable with community

Manage for Transition
Manage with authority and respect

Review local leadership project management to avoid conflict of interest / corruption

Resolve suitable design / construction and act quickly and effectively so can manage adjust locally without loss

Tight Project Control
Process good communications with tight control

Understand, Involve, Sustain, Learning, Localised, Training

Need Programme Monitoring and Evaluation to address how to achieve key system of

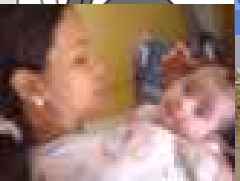
1. Urgency
2. Control
3. Governance and each project level

Local Capability / Integrity
Employ Sound Quality Practices

SUCCESS

Sustainable Outcomes

Community focussed approach with Donor /Govt relationship effectively to achieve sustainable communities



Working from Rich Picture Master Summary to Key Success Factors PSA Project Aid From SSM

Goals



Rapid Assessment

Trust

Leadership

Empathy

Understanding

Sustainable

Learning

Stakeholders / Culture / Vision / Shared / Lead

NGO, Donor Community Culture, Differences, Board Distance, Different Chains of Command

Organisation / Urgency / Community / Values

Need simple connection between bottom up planning & top down commitment

Communication / Process / Flexibility / Respect

Need essential tools that clarify and give understanding and enable workable communication of plans, action, outcomes & what it means to all involved at all times

Plan / Feasible / Method / Synthesis / Learning

Effective Communication Process Combine

Manage / Performance / Criteria / Risk / Action

Accurate Verifiable Information? Timeline, Finance, Budget, Audit

Commit / Resource / Contingency / Milestone

Monitor / Evaluate / Project / Programme / KSC

Sustainable Outcomes

Address communication problems between high level and field staff due to language / culture / distance / logistics . Use keys of communication

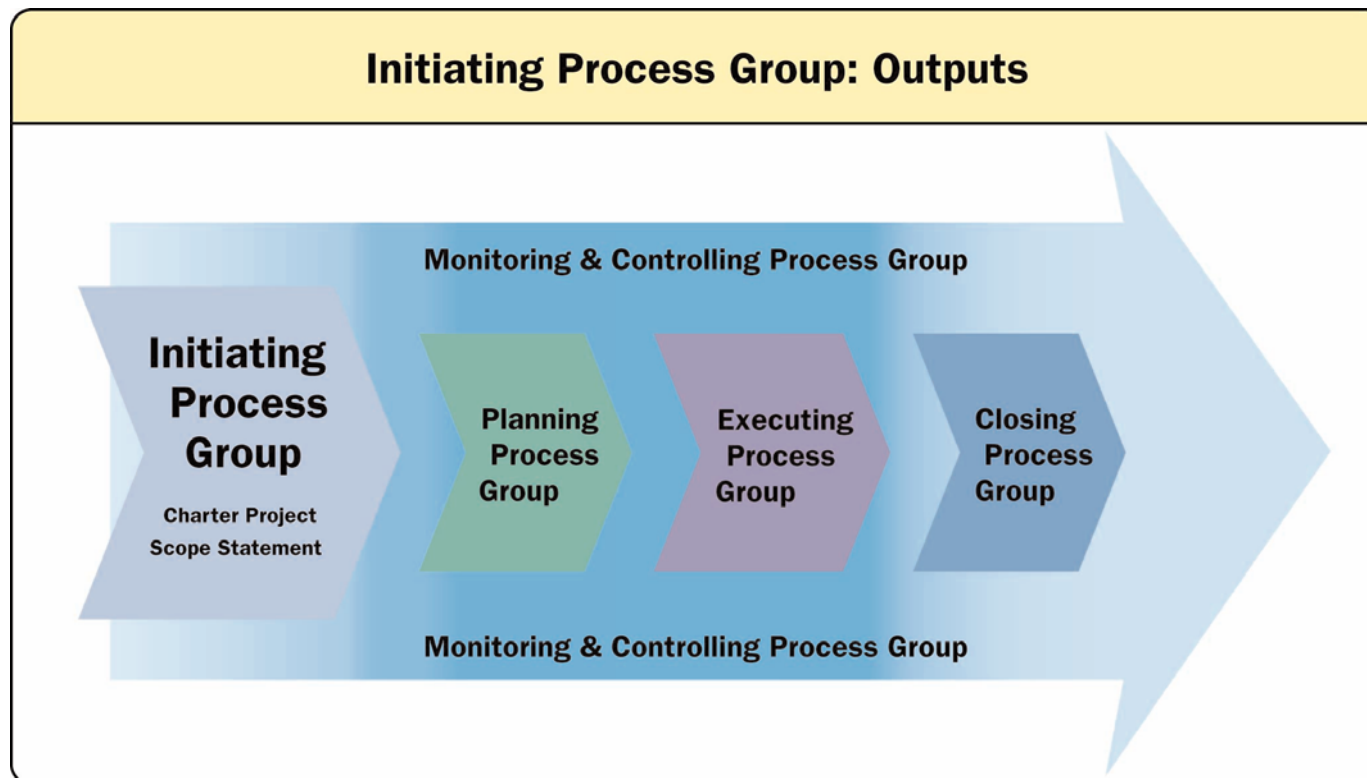
Danger of planning being done in isolation – need to involve all keys Planning needs to be s.m.a.r.t. and have agreed Key Success Criteria (KSC)@ organisation and project level

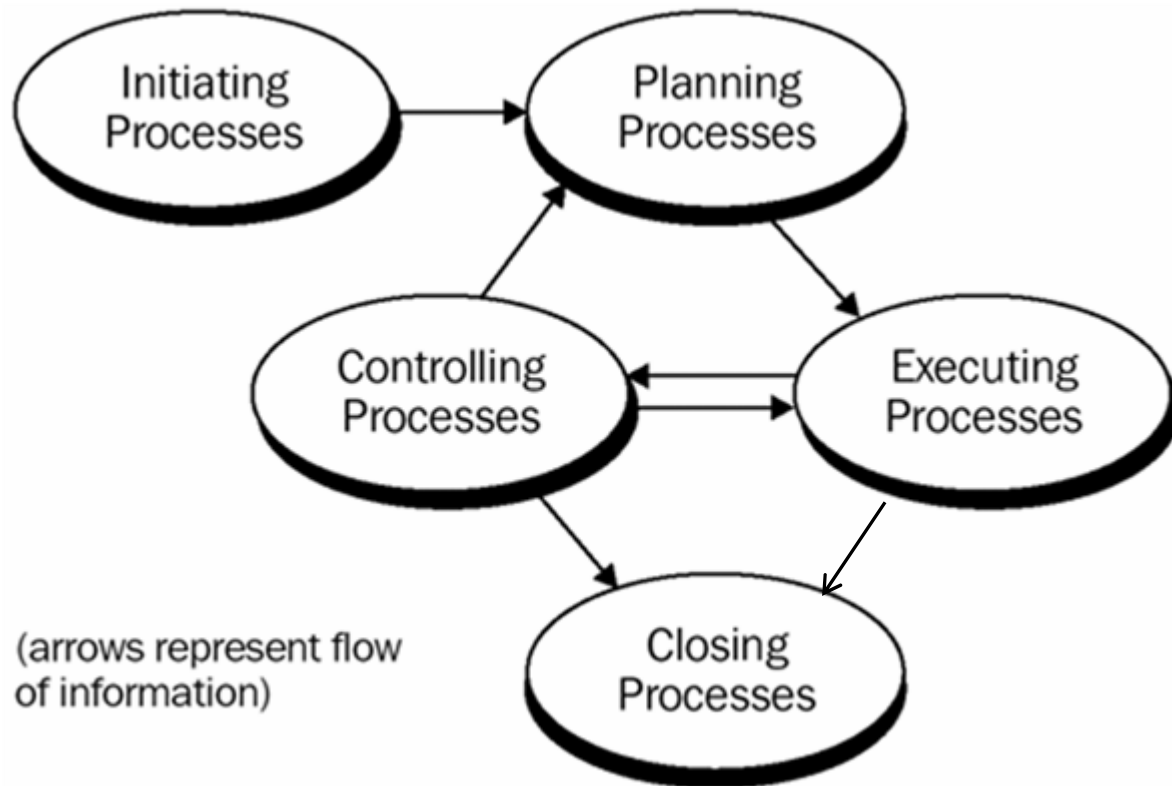


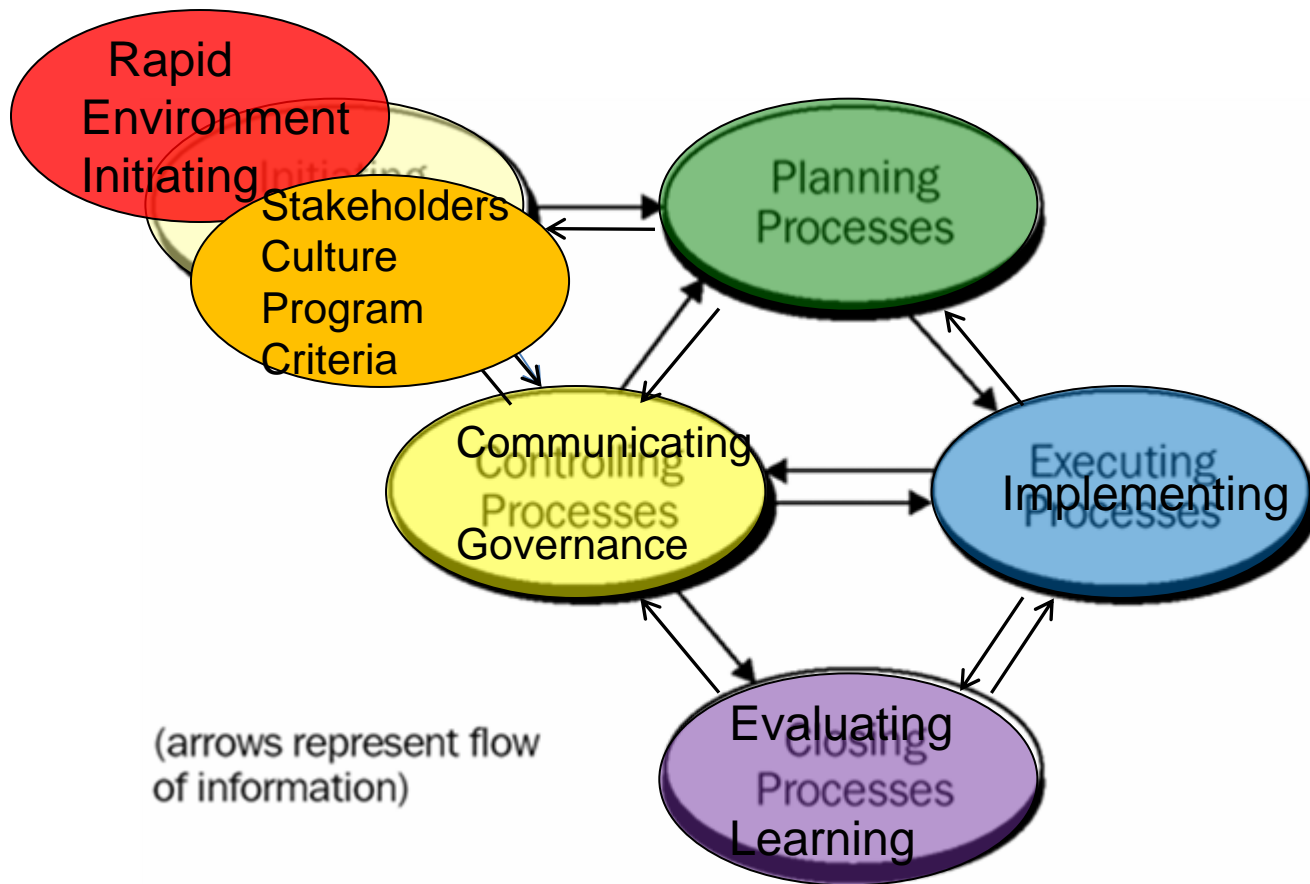
Donor NGO Beneficiary Community. Only Commit when Feasible

Programme Monitoring and Evaluation needs key success criteria agreed and smart simple but effective planning and communication methods to achieve commitment and understanding to realistic sustainable outcome

PMI Disaster Rebuild



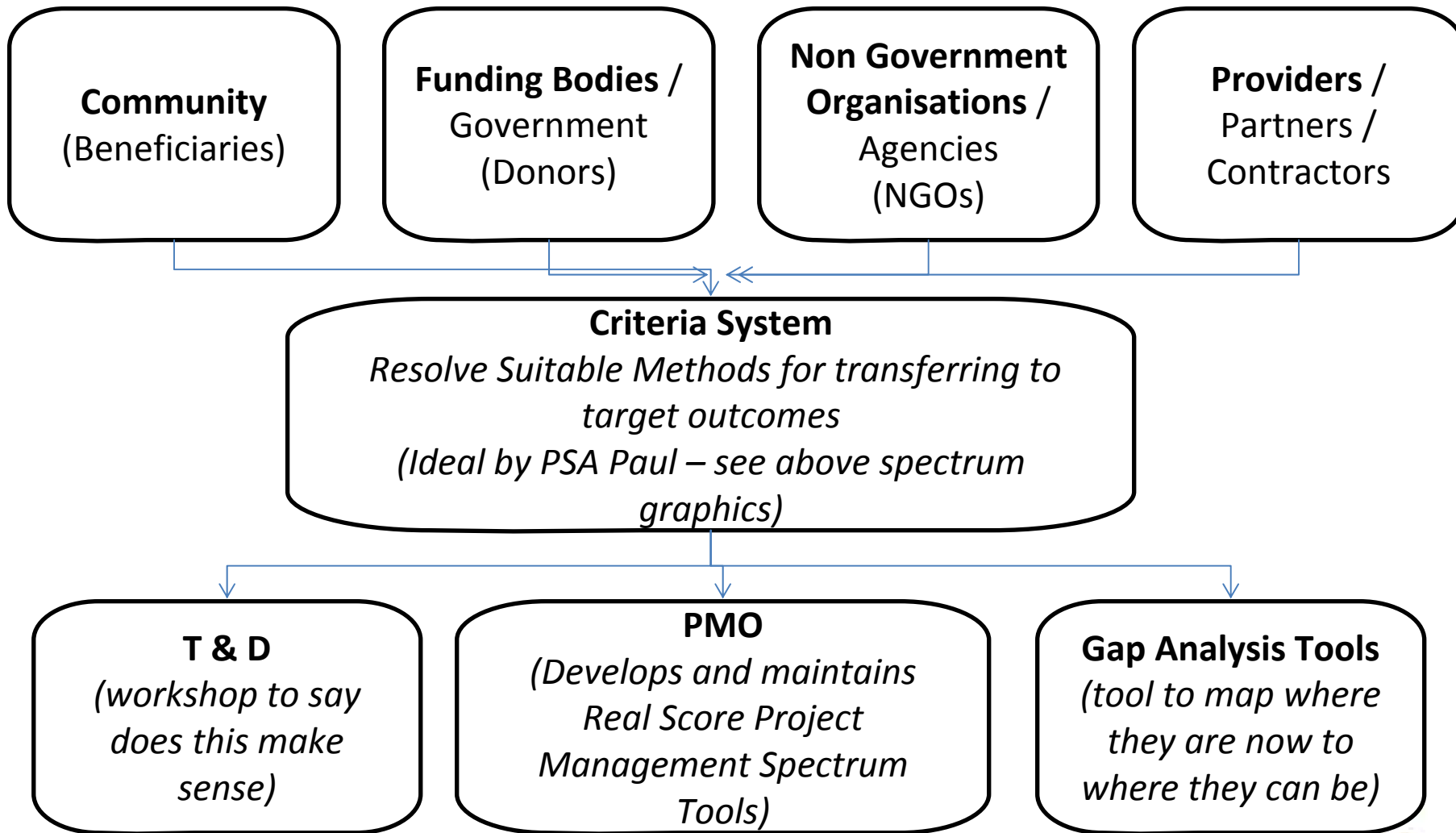




CATWOE Key Sentences

- To enable a group / temporary organisation of Community, Donor(s), NGO(s) / project manager to assess, scope, plan, agree, commit to and implement (from competing projects) an appropriate and feasible programme for a community after a disaster or for relief / recovery / reconstruction / sustainable outcomes.
- The transformations will be Tangible & Intangible – Infrastructure / Shelter / Security / Livelihood / Knowledge, Competence, Process, Trust, Support, Empathy, Understanding, Sustainable and a Safe Future for that Community





Rich Picture Master Summary for **General Project Organisation** from Lit / PSA / General Review



Key Success Factors – **Project Specific** - Lit Review / PSA / Rich Picture Master Summary

External Environment / Political / Power / Technical / Nature

Organisation / Stakeholder / Purpose / Competence / Communication / Integrity

Project Team, Manager / Communication / Competence / Leadership / Trust / Support

Project / Stakeholder Key / Feasible / Goals / Purpose / Tangible / Intangible / Learning

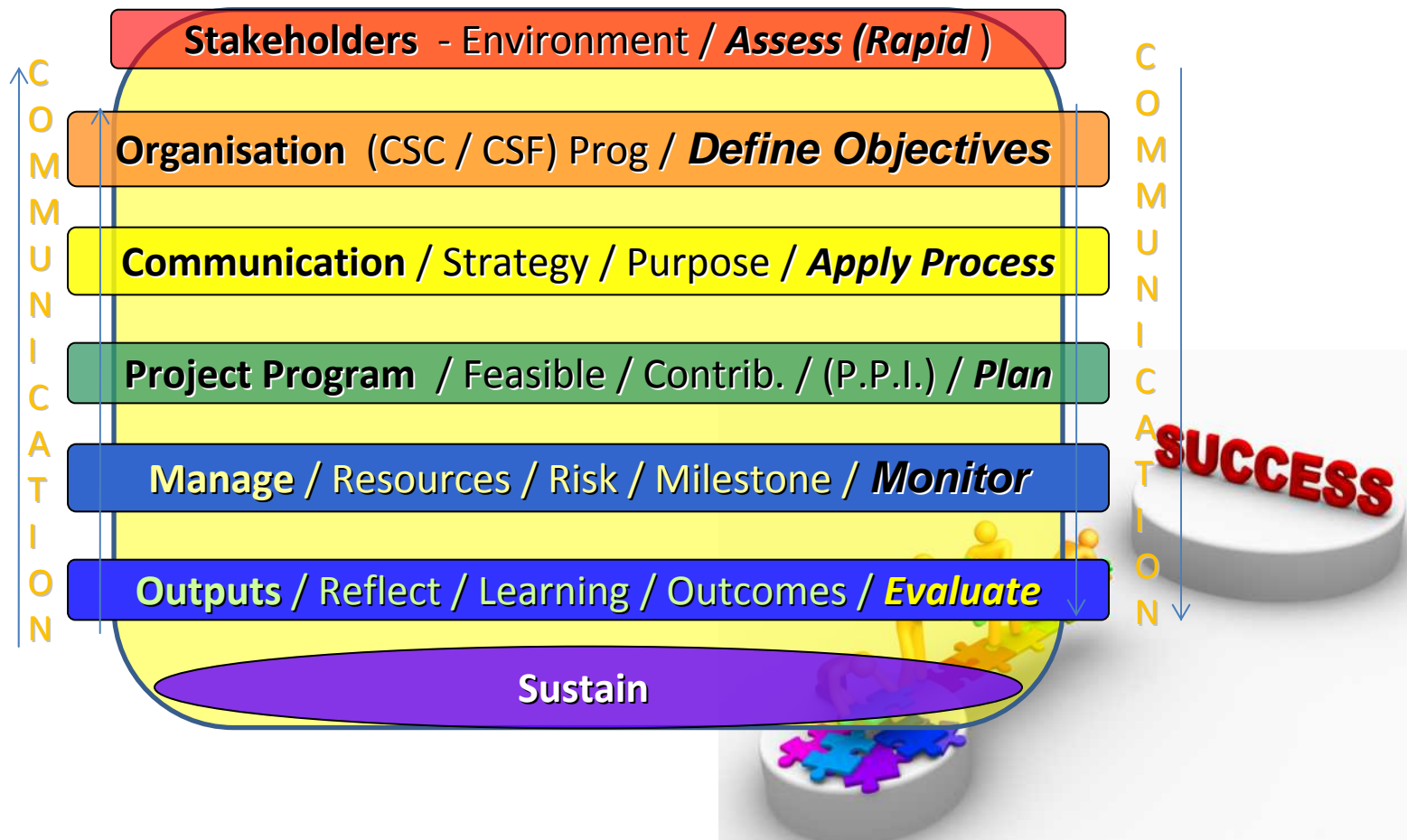
Project Plan / Programme / Inputs / Outputs / Risks / Targets / Contingency Planning

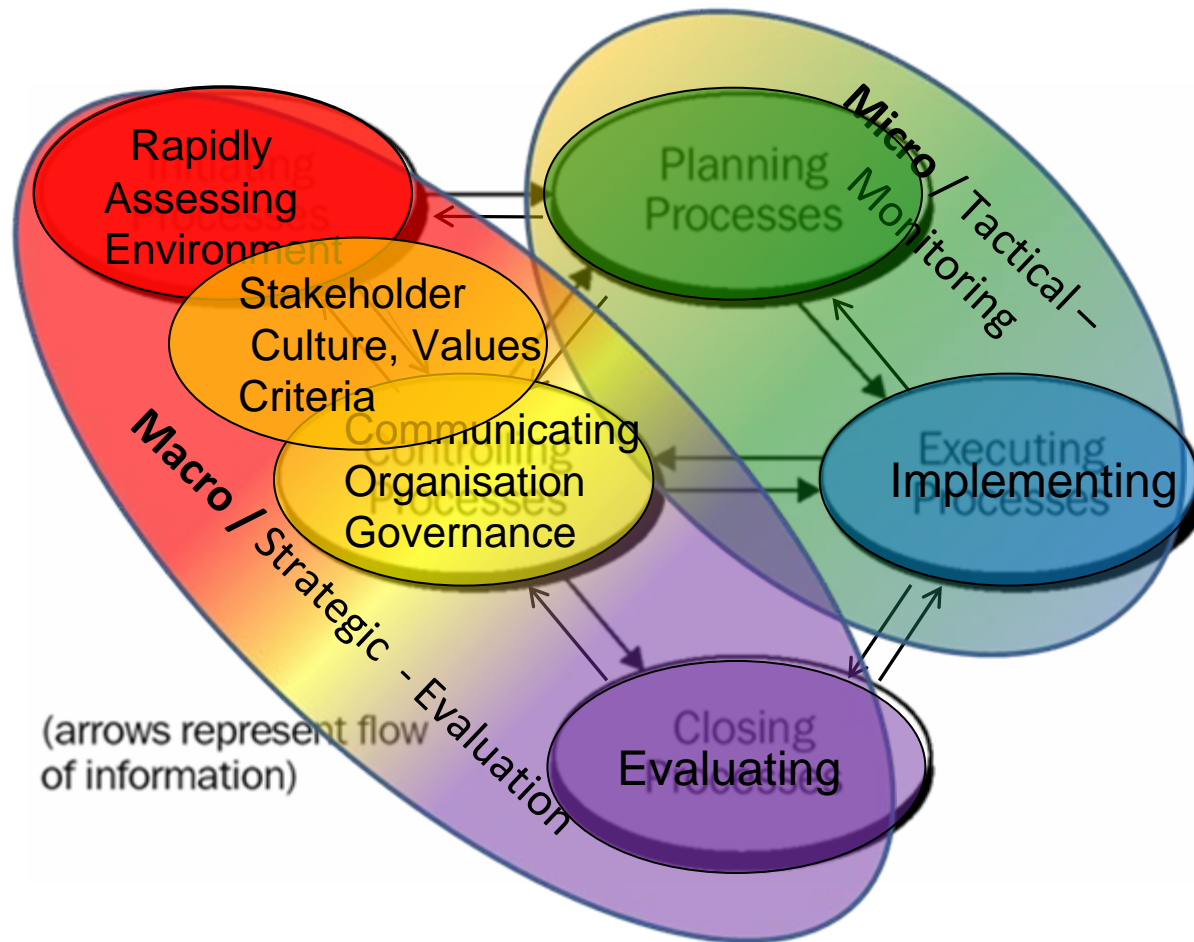
Implement / Lead / Communicate / Commit / Target / Milestone / Risk / Contingency

Monitor CSF, PPI / **Evaluate** CSC, PPR / Performance / Communicate / Learnings

Achieve Sustainable Outcomes

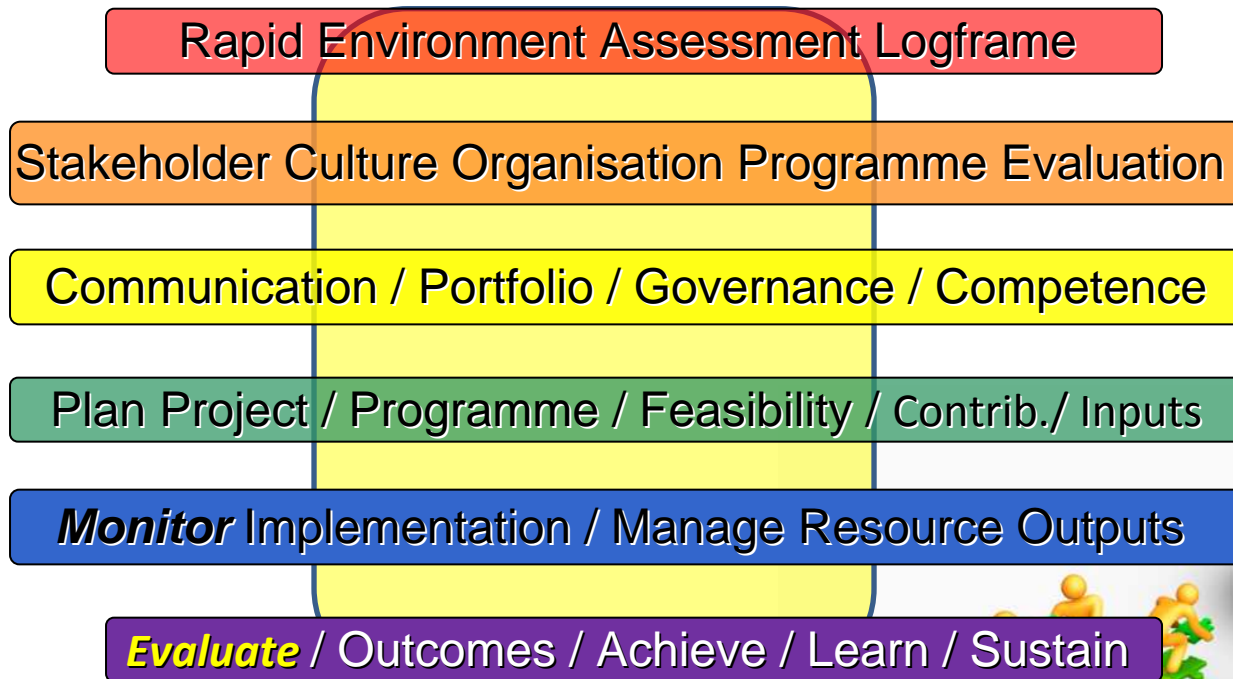
Rich Picture Master Summary for Project Post Disaster from SSM





Rich Picture Master Summary for **Project Post Disaster** from SSM

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SUCCESS

PMI Post-Disaster Methodology Gaps

1 - Project Type – Project or Programme?

Focuses on **projects only** and at a mainly **material** level

2 - Cultural Understanding / Stakeholder Leadership

Has **negligible** stakeholder management / **needs assessment** and **no rapid appraisal / assessment techniques** or **guidance**. Large gaps in real needs of these emergencies. Has **no real cultural difference understanding or engagement processes**

3 - Accountability for Project Success

Does not focus on methods of Programme Evaluation
or the fundamentals of emergency project management or other critical success factors in disaster programmes



A Critique of the PMI Post-Disaster Rebuild Methodology

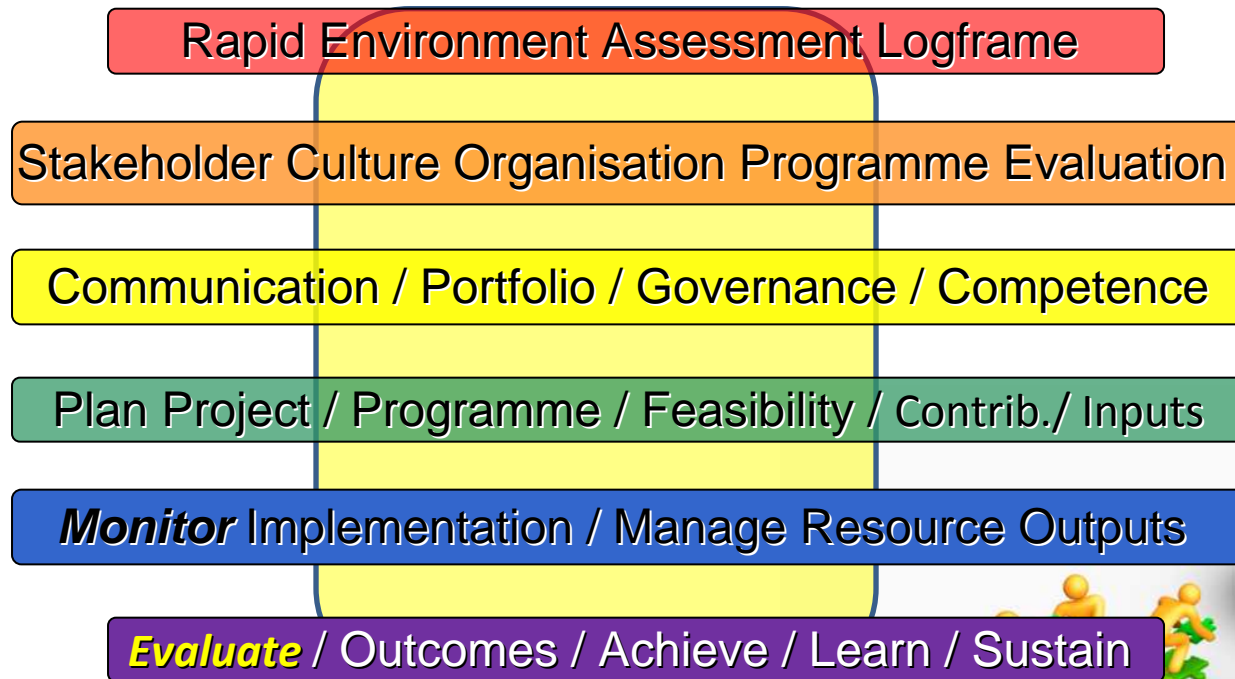
PMI Post-Disaster Methodology Gaps

- 1 - Project Type – Project or Program with Urgency?*
- 2 - Cultural Understanding / Stakeholder Leadership*
- 3 - Accountability for Project Success*



Rich Picture Master Summary for **Project Post Disaster** from SSM

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SUCCESS



Rich Picture Master Summary for **Project Post Disaster** from SSM

Rapid Environment Assessment Logframe	Red: <i>urgency</i> , danger, blood
Stakeholder Culture Organisation Program Evaltn.	Orange: <i>support</i> , caution, warning
Communication / Portfolio / Governance / Compet	Yellow: <i>persuasion</i> , intellect, creativity
Plan Projects / Programme / Feasibility / Inputs	Green: <i>growth</i> , safety, nature
Monitor Implementation / Manage Resource	Blue: <i>depth</i> , sky / sea, confidence
Evaluate / Outcomes / Learn / Sustain	Purple: <i>independence</i> , wisdom, dignity

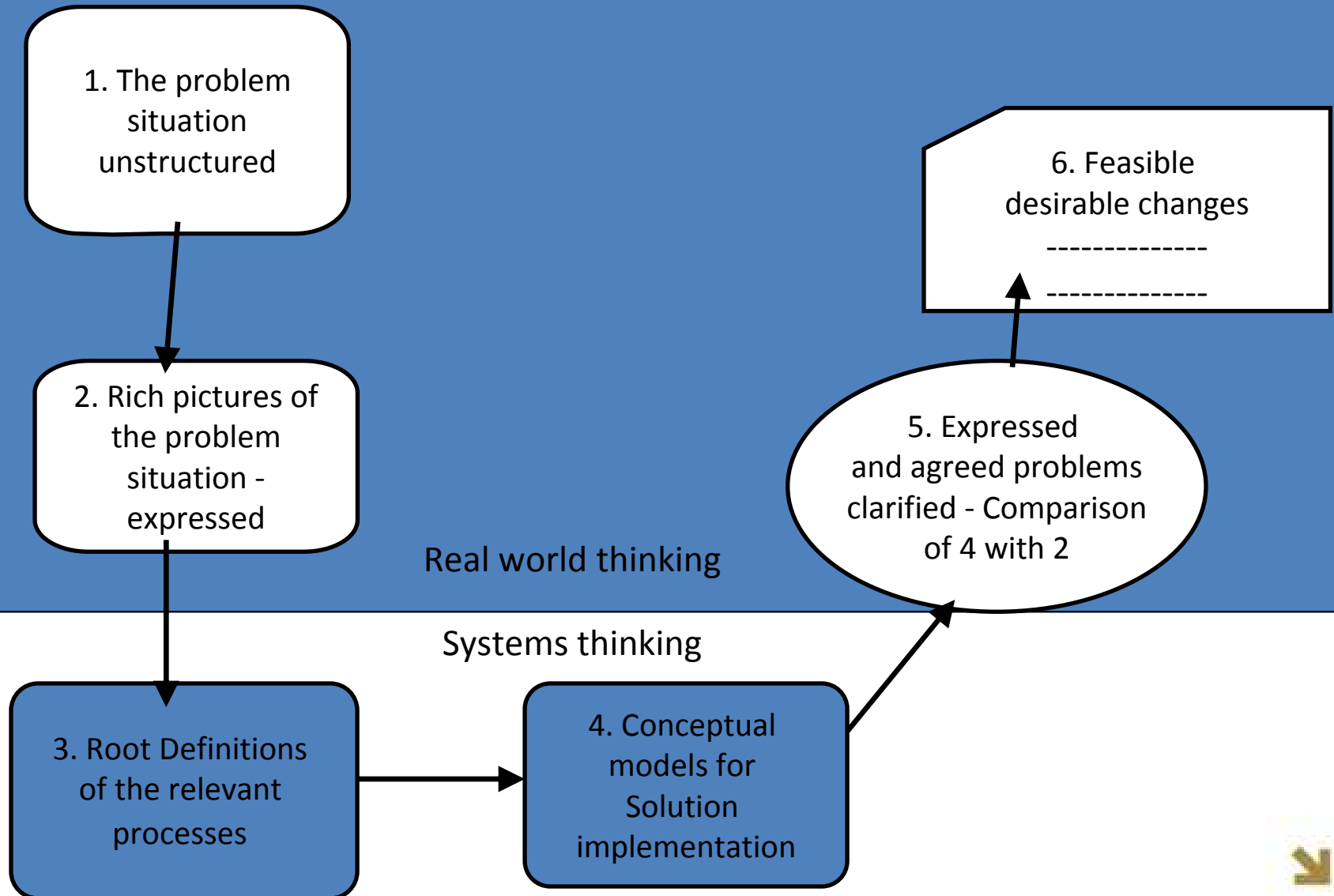


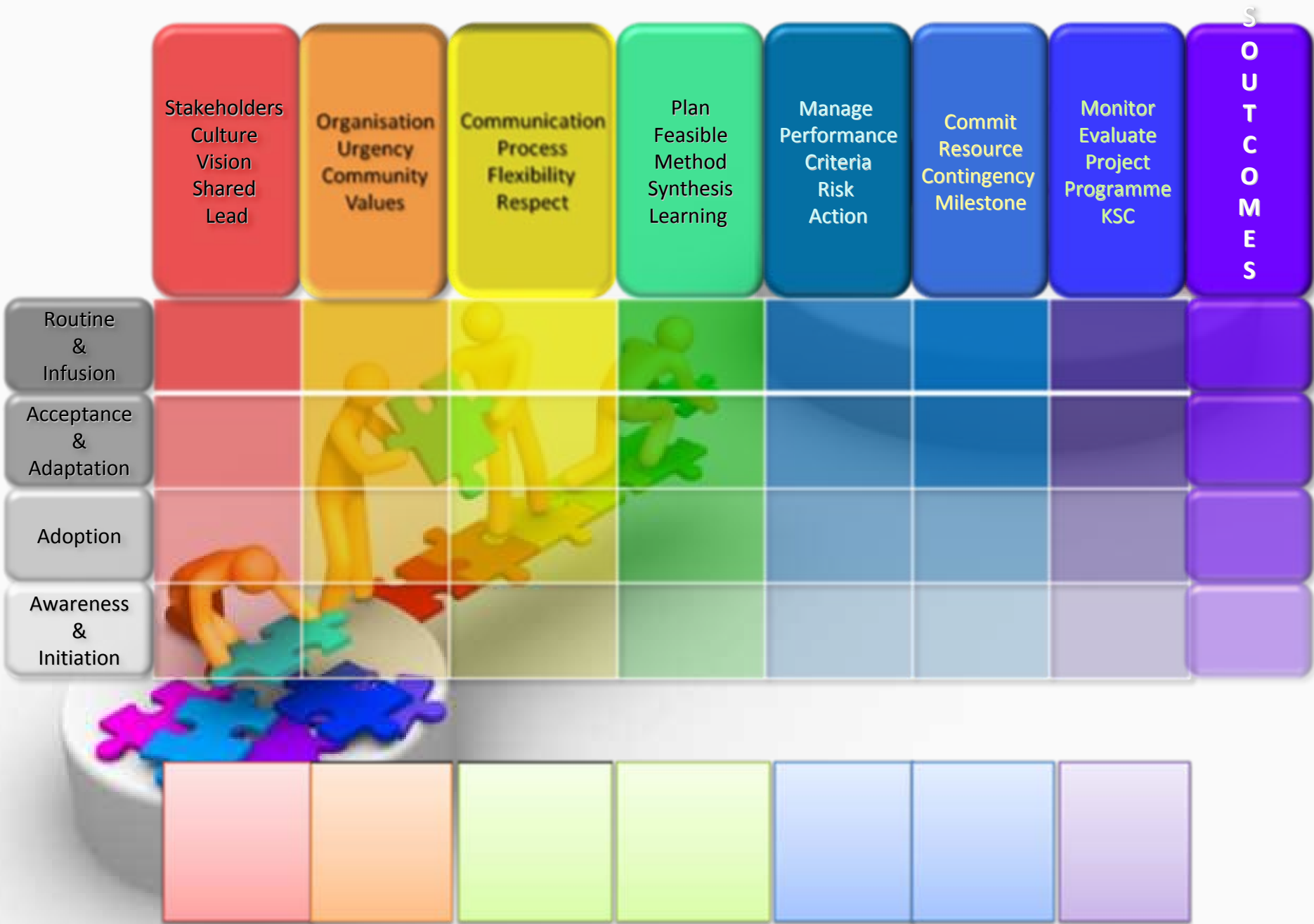
Rich Picture International Colour Legend

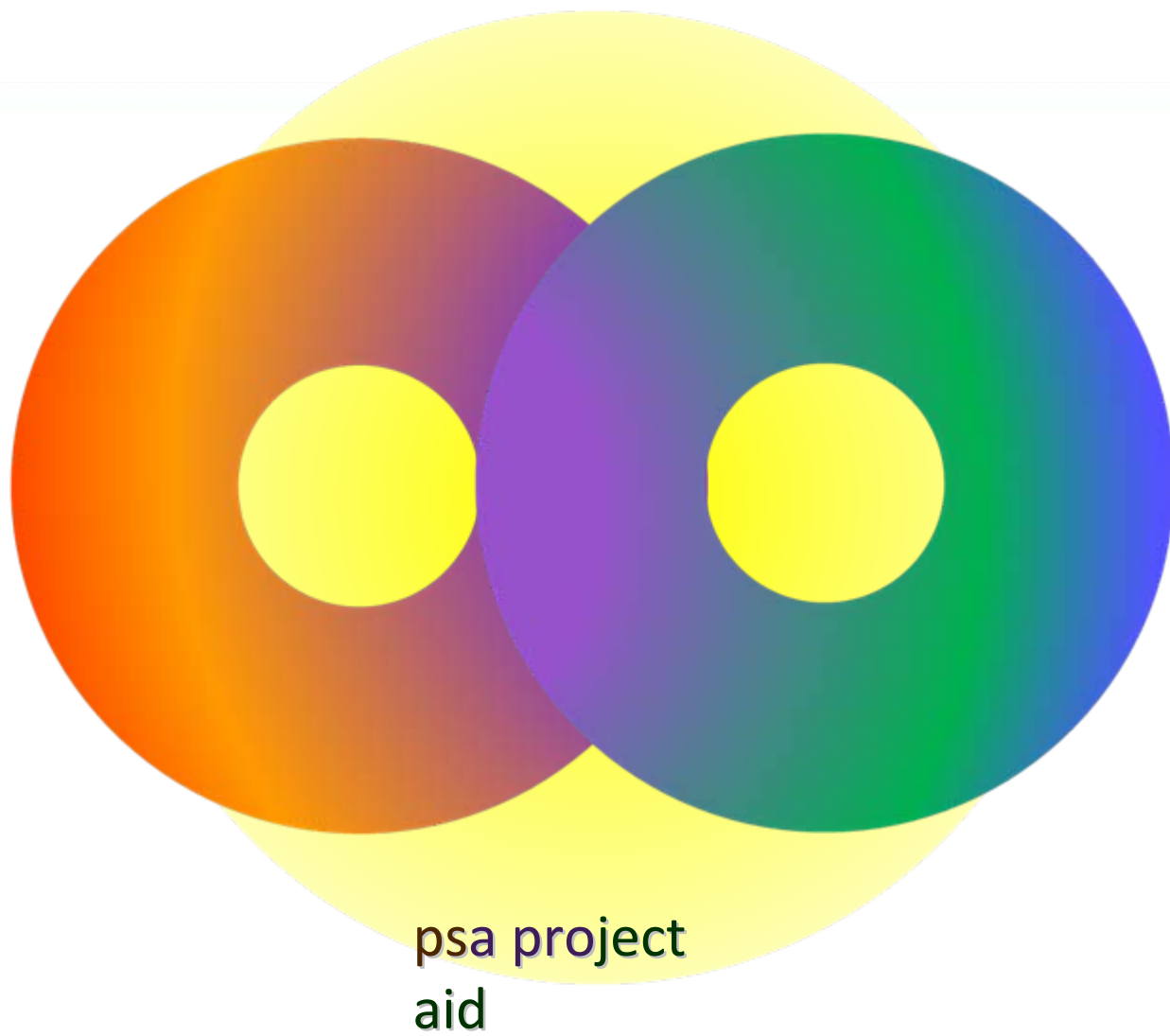
Red: <i>urgency</i> , danger, blood
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6. Feasible Desirable Changes







psa project
aid



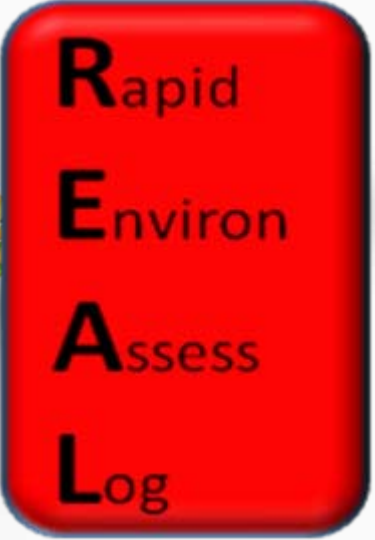


Rapid
Environ
Assess
Log

Key Factors for Rapid Assessment (PMBOK *Initiation Phase*)

- o External Environment - Background, Context, Culture, Values
- o Programme Purpose – Key Objectives / Value, Sustainable Outcomes, Criteria





Rapid Assessment

Key words; Rapid Assessment / Context / Purpose / Culture / Urgency / Risks / Culture / Temporary Organisation/ Stakeholders /Key Objectives /Sustainable / Criteria for Evaluation.

Primary Factors for Rapid Assessment

Environment Background / Context (Urgency)

- External Environment (Political, Power, Nature, Technical)
- Background (Needs, Requirements, Context, Value)
- Stakeholders (Values, Culture, Vision, Leaders)

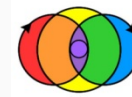




Rapid
Environ
Assess
Log

Programme Purpose

- Key Objectives / Value
- Assumptions
- Risks
- Necessary Inputs and Resources
- Sustainable Strategies and Values
- Outcomes (Long Term Goals) / Impacts (long term sustainable?)
- Indicators (Key Criteria or Scoring for Evaluation)
- Key Milestones (with realistic contingency to key targets)
- And Programme overview
 - Activities (comes from WBS / Programme Plan Breakdown)
 - Inputs (from activities / WBS) incl. Resources (from activities / WBS)
 - Outputs are deliverables on given projects



Stakeholder
Culture
Organisation
Purpose
Engagement

Key Add Factors for Stakeholder Engagement Scope (*PMBOK Initiation Phase*)

- o Stakeholder Needs Analysis Scope (may be in table / matrix form)
- o Programme Governance Structure and Process / Methodology
- o Scope / Value Criteria for Regular Evaluation and Project / Programme Management



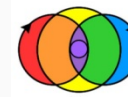


Stakeholder
Culture
Organisation
Purpose
Engagement

Programme Purpose Stakeholder Needs Analysis

- **Stakeholder reference group** to help define value, goals, methods of recording stakeholders, their cultural artefacts, level of interest and their level of influence.
- **Stakeholder Influence chart** – resolve key values, criteria, strategies culture of stakeholders, with power / influence / relationships / mix identified and understood.
- **Key stakeholder / key resource understanding of the Scope** (boundaries) – value goals / objectives with a clear and agreed statement of outcomes defined.
- **Define and agree project goals - project scope.** Along with project champion & leader.
- **Outline Governance Process** – Key Macro to Micro Process and Evaluation Criteria





Communication

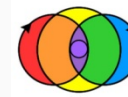
Process



Key Factors for Communication Process (*PMBOK Initiation Phase*)

- o People - Skills / Competencies / Self Actualisation keys
- o Communication Process / Method – Understandable at each level gaining ownership
- o Governance - Organisation Structure between all levels reflecting macro / micro value

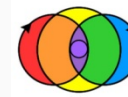




Communication and Governance

- **People - Skills / Competencies / Self Actualisation** are the key to interpret, report, forecast progress and strategy.
- **Communication process** to work between high level and field staff due to language / culture / distance / logistics. Feasible communication plan in terms of resources, contingencies, risks and outcomes resolved and signed off by all key players
- **Governance** – Effective process and direction with head to key evaluation criteria and linked macro and micro processes in initiation, planning, implementation monitoring and evaluation.
- **Organisation structure** to be adequate and agreed. Senior Management / Board support understood, stated and experienced.



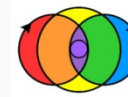


Programme
Project
Plan
Perform

Key Factors for Programme Planning (*PMBOK Planning Phase*)

- o Feasible Programme / Project Planning - evaluation criteria focus / resources / group
- o Group, Programme and Project Evaluation Practice Metrics / Values - Macro / Micro
- o Practical Programme Planning, problem solving, risk & contingency planning, dependency programmes, replanning, resource, commitment, s.m.a.r.t and flexible, human.





Programme
Project
Plan
Perform

Programme and Project Planning

- **Practical Programme Planning** Problem Solving, Replanning with Contingency Planning, Dependency Programmes. Targets, Contingency Planning, Outcomes, Risk Management with appropriate contingency
- **The feasibility of that planning** in terms of key goals targets / risks, resources, contingencies, risks and outcomes resolved and signed off by all key players.
- **Programme and project management practices** that allow the group or organisation to resource fully a suite of projects that are thoughtfully and dynamically matched to the programme strategy and development objectives.
- **Project, programme / portfolio metrics** that provides direct 'line of sight' feedback on project performance, and anticipated future success, so that project, programme and group decisions can be aligned. ↘



Monitor
Sustainable
Outcome

Keys Factors for Monitoring (PMBOK Implementation Phase)

- o Implement, Communicate, Lead and Achieve / Review Plan - Resolve, Replan, Update Action, Contingency / Risk
- o Monitor Performance & Commitment - People & competence are key to interpret, report, forecast progress - Timeline, Resource, Contract, Budget, Audit.
- o Review Targets (monitoring) and Achieve Key Criteria ongoing thru Evaluation



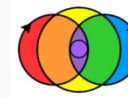


Project Implementation and Monitoring

- **Check the feasibility of the programme / plan** in terms of resources, contingencies, risks and outcomes resolved and signed off by all key players
- **Check Clear Risk Understanding** - Identification / Assignment of Risk in Delivery
- **Check Agreed Action, Commitment** - Contract, Contingency and Risk - *Are both tangible and intangible costs being addressed?*
- **Implement, Communicate, Achieve**

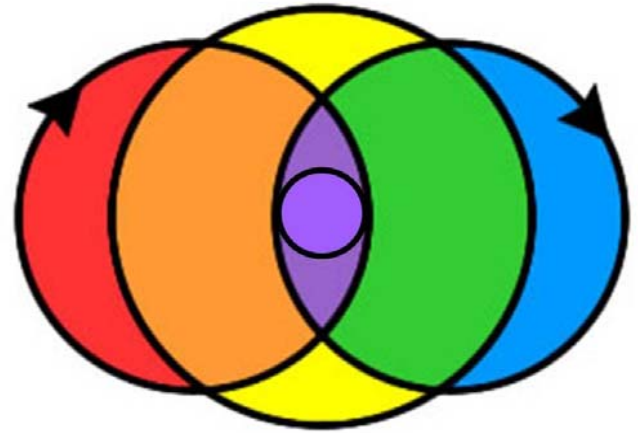
Manage & Monitor – Performance, Contingency, Risk , Action, Criteria (CSF), Audit





Ongoing Keys for Evaluation (PMBOK Controlling Phase)

- o Value / Benefits / Performance / Simple Effective Workable Overview
- o Key success criteria agreed & smart simple but effective planning and communication methods – key Goals, Questions, Metrics
- o Simplify and Focus the Project - Maximise realisation of gains through Evaluation



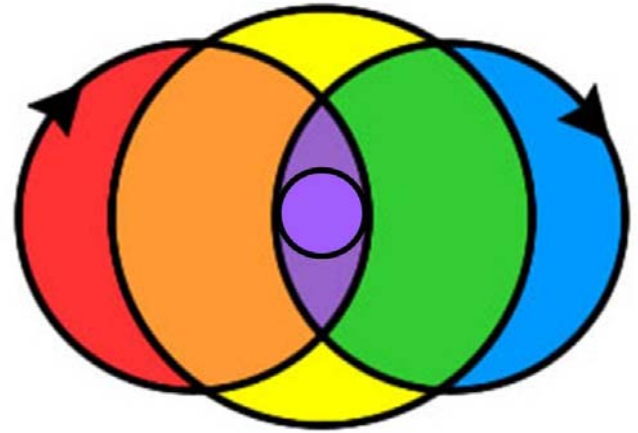
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Effective Evaluation & Growth for organisation / programme

by realisation of criteria (CCS & CSF) for

***Organisation Value, Programme Plans, Goals, Risks,
Contingency, Outcomes, Sustainable Growth.***



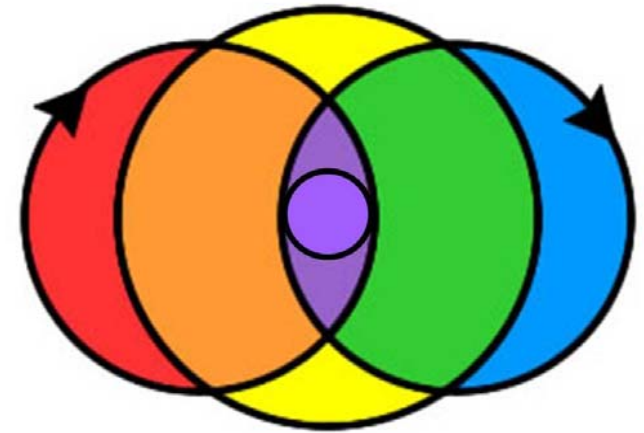


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Key Questions

- Can each aspect of the project be evaluated?***
- Is the evaluation system built into the project?***





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• **Evaluation Factors – to Evaluate the Feasibility and Sustainability of the Temporary Organisation/ Programme /Project by being able to effectively review with all key s the**

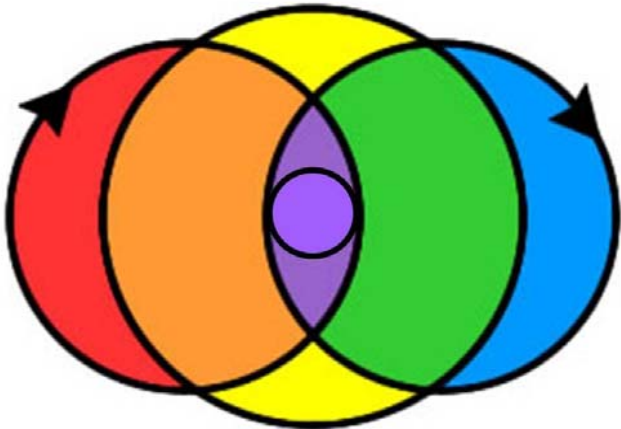
1.Value / Benefits Realisation, Outcomes, Stakeholder Expectations & Satisfaction Criteria

2.Goals (take care with initial over-optimism, conceptual difficulty) Rich Communication, Key Agreed Criteria, Leadership, Flexible, Understood, Enable to Implement & Evaluate.

3.Performance (ensure success criteria, clarity and consensus)

4.Risks (realistic and then target milestones with adequate contingency)

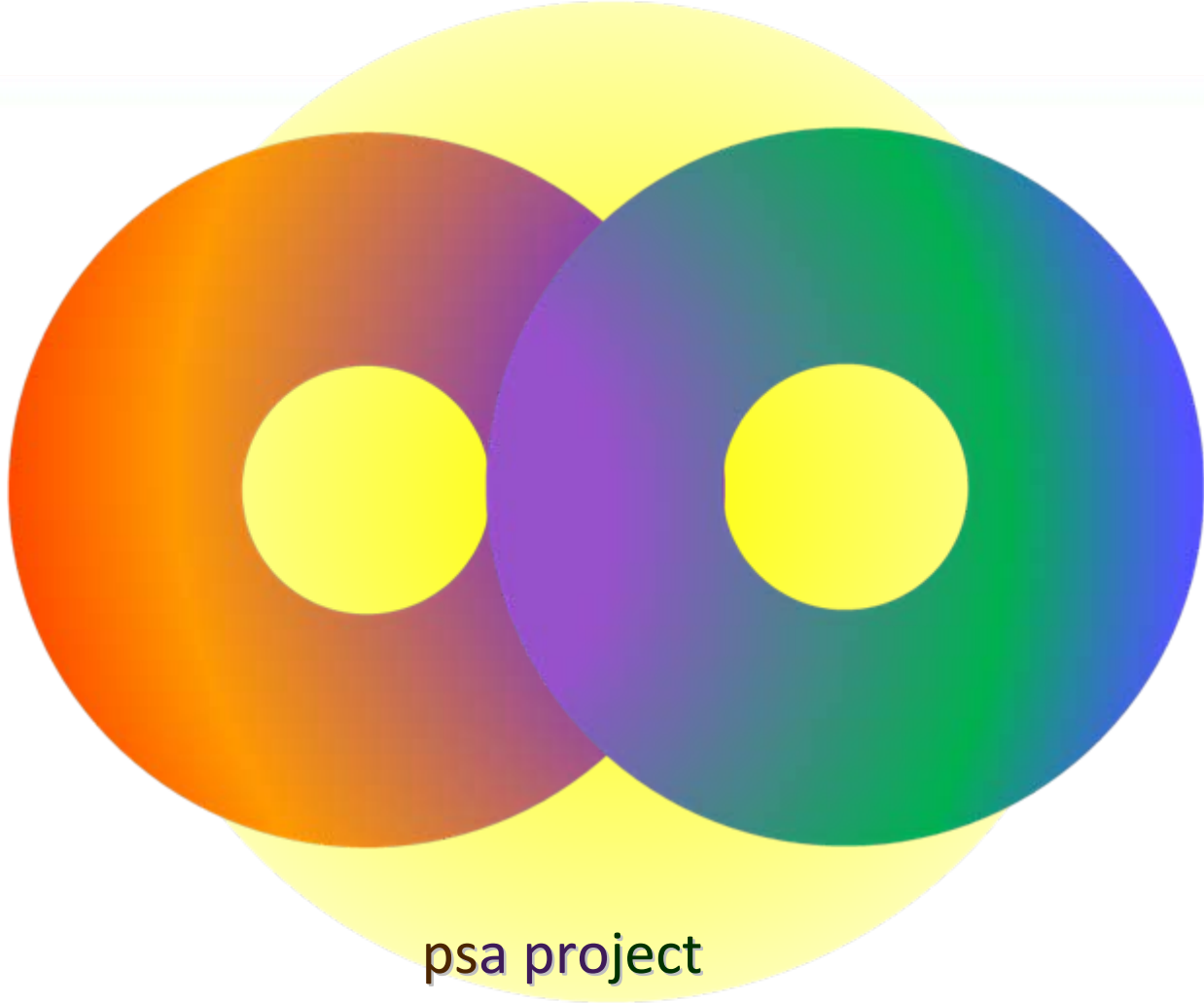
5.Outcome (success / failure, satisfaction / dissatisfaction)



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Effective Evaluation & Growth for organisation / programme





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