

# Planning and Executing a Partnership Project

## Handouts and Activities

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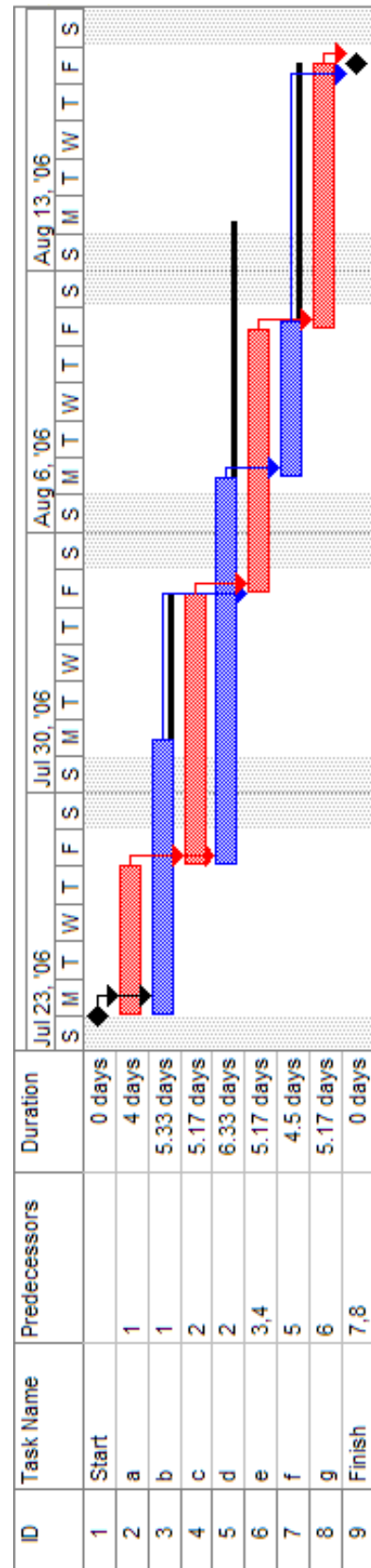
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## Gantt Charting

1. Identify essential tasks
2. Estimate how long each task should take to complete
  - a. Building in contingency time and buffers
3. Identify task relationships
  - a. Parallel tasks – can be done at the same times as other tasks
  - b. Sequential tasks – tasks that must be done in a particular order
4. Input tasks and timelines into software program
  - a. MS Excel, MS Project, Matchware, Gantto
5. Chart progress over time
  - a. Revise as necessary

Week of...	14-Jul	21-Jul	28-Jul
<b>Research Design Phase</b>			
Kickoff			
Define Scope			
Revise			
<b>Data Collection Phase</b>			
Schedule Interviews			
Conduct Interviews			
Survey			
Analysis			
<b>Final Report Creation</b>			
Writing			
Copy editing			
Layout			
Report Launch			



## Responsibility Charting

(Steve Outram, 2016)

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The objectives/ benefits of responsibility charting are to:

- Assist natural work teams in charting roles and responsibilities consistently
- Assist the implementation of tasks
- Clarify individual roles
- Eliminate misunderstandings, duplication of effort and encourage team-working
- Improve communication

### Principles

**A = APPROVE** - a person who must sign off or veto a decision before it is implemented or selected from options developed by the R role; accountable for the quality of the decision. **“The buck stops here”**

**R = RESPONSIBLE** - the person who takes the initiative in the particular area, develops the alternatives, analyses the situation, makes the initial recommendation, and is accountable if nothing happens in the area. **“The doer”**

**C = CONSULTED** - a person who must be consulted prior to a decision being reached but with no veto power. **“In the loop”**

**I = INFORMED** - a person who must be notified after a decision, but before it is publicly announced; someone who needs to know the outcome for other related tasks but need not give input. **“Keep in the picture”**

**DK = DON'T KNOW**

A blank indicates no relationship.

- Accountability and responsibility should be placed at the closest level to the action or knowledge
- There can only be one accountability per activity
- The number of consultants and informs should be minimised
- All roles and responsibilities should be documented

## Process Steps

The creation of a responsibility chart is an iterative process using the following steps:

### **Step 1: Make a function matrix form**

Down the left side, the functions that are at issue are listed.

### **Step 2: Develop Mutually Understood Codes to Describe Type of Participation**

A useful way of testing the understanding of the codes is for each to describe a function using the terms and then compare to see if all are interpreting them in a similar fashion. Often groups modify the above basic terms with subscripts, capitals and small case, or adding new terms.

### **Step 3: Individual Balloting on the functions**

Working horizontally, each of us should fill out the chart as he or she thinks that function is discharged, not how it should be or how it is prescribed in some manual. People should fill out all columns, not just their own.

### **Step 4: Record the Data**

The forms will be collected and the aggregate results recorded on a large form that can be seen by the whole group or on a smaller form, with copies distributed to the group.

### **Step 5: Analyse and Discuss**

There are three major aspects to the analysis. The first involves clarification of discrepancies in how different parties see functions being discharged. The second and third involve discussions about the overall pattern across roles (horizontal) or across functions vertical.

### **Step 6: Analysis of Discrepancies**

If a large number of discrepancies exist between the codes entered by the decision-maker for him or herself and those entered by others, the group needs to clarify what is going on. Often the process of responsibility charting itself will help to improve this condition.

<i>Name</i>								
<i>Activity</i>								

A – Approve      R – Responsible      C – Consulted      I – Informed

## Vertical Analysis

<i>If there are...</i>	<i>Then we need to ask...</i>
Lots of R's	Can or need the individual stay on top of so much? Can the activity be broken and disaggregated into more manageable activities?
No empty spaces	Does the individual need to be involved in so many activities? Are they a 'gatekeeper' or could management by exception principles be used? Can C's be reduced to I's?
No R's or A's	Should this functional role be eliminated?
Too many A's	Should other groups/ individuals be accountable for some of these activities to ensure checks and balances/ Is this a 'bottleneck' in the process?

## Horizontal Analysis

<i>If there are...</i>	<i>Then we need to ask...</i>
No R's	Is the job getting done? Some roles may be waiting to approve, be consulted, or informed. No-one sees their role to take the initiative
Too many R's	Is this a sign of overkill? How are the different interpretations of R managed? Is there confusion?
No A's	Why not? There must be an A. Accountability should be pushed down to the most appropriate level
Too many A's	There should only be one A per activity
Too few A's and R's	The process must slow down while the activity is performed on an ad hoc basis or the procedure may be outdated and should be streamlined or eliminated
Lots of I's	Do all the roles need to be routinely informed or only in exceptional circumstances?
Every box filled in	They shouldn't be. If they are, too many people are involved – usually too many C's and I's

## Success Indicator Activity

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Recognizing and celebrating successes is an important—and often forgotten—aspect of project management. In this activity, each team member will:

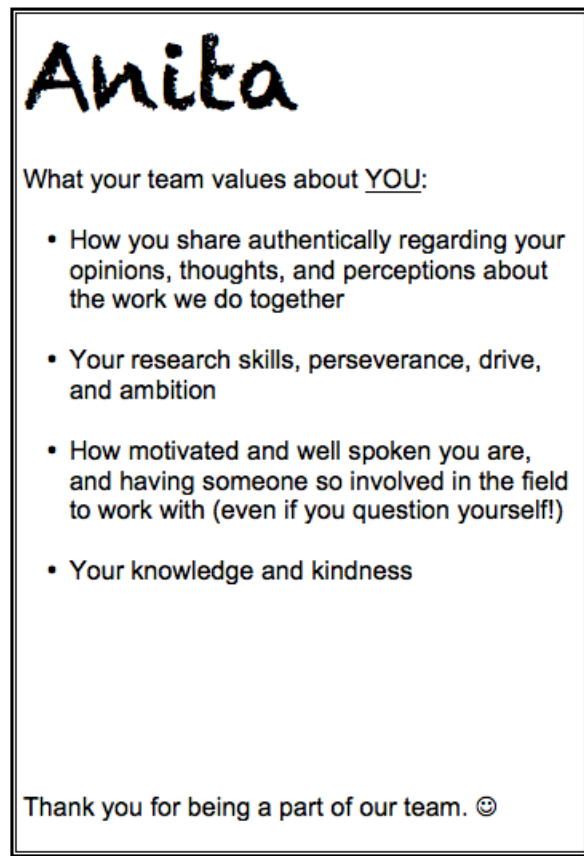
- Identify the strengths that their fellow colleagues bring to the team;
- Ensure that they clearly communicate these strengths to their colleagues;
- Become aware of the strengths that others perceive in them.

**Step 1:** Each person should receive several small pieces of paper (one for each team member minus themselves).

**Step 2:** On each piece of paper, each team member should write the name of a teammate as well as one positive contribution that they feel that they bring to the team on a regular basis. For example, “Suzie is always organized—she keeps our team on task and makes sure things get done!”

**Step 3:** Each person is responsible for compiling one team member’s comments onto a single piece of paper. They then read this aloud to that team member. Giving them a paper copy is also a nice memento!

**Example:**



## Risk Analysis Activity

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The purpose of risk analysis is to identify factors that could potentially derail your project *before* they happen and to develop a plan of action for tackling them. In this activity, you will work through a step-by-step process for understanding potential risks that may stand in the way of the successful completion of your project. As a team, you will then characterize these risks and decide what type of action is required.

**Step 1:** Working alone, without discussion, write down the three or four factors that exist now (or which could exist during the project) that you believe would prevent success. Factors can be internal or external, physical (e.g., lack of resources or space), behaviour (e.g., lack of cooperation or teamwork), attitudes, client relations, etc.

**Step 2:** As a team, list the factors or concerns on a flipchart, taking one from each person until all are listed. It is not necessary to repeat the same item. Number the items for easy reference.

**Step 3:** Individually, without discussion, select the three or four factors that you believe would have the greatest impact. Do not worry about whether or not they can be resolved by the team. Write the numbers down.

**Step 4:** As a team, place check marks beside each person's choices. Circle the three or four items with the greatest number of checks. These are probably the most important items. If they could be resolved it would greatly improve the chance of success.

**Step 5:** As a team, rate the selected most important items for solvability according to the following:

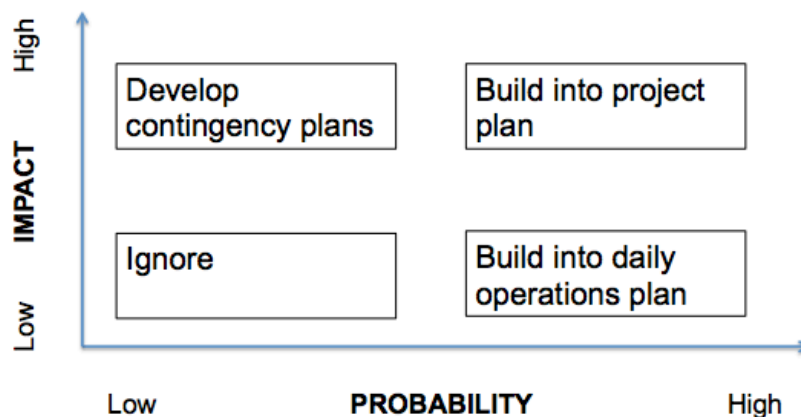
A: could be resolved by the team

B: requires others (such as a higher level of management), but the team could influence the outcome

C: cannot be influenced by the team (if they team cannot influence the solution, no effort should be wasted on the item)

**Step 6:** As a team, brainstorm solutions to the A and B rated items and select the best ideas for action.

## Probability vs. Impact





**Project Charter**

(Susan Vaughan, 2016)

**Version x.x****Project Name:** \_\_\_\_\_**Project Id:** \_\_\_\_\_**Project Manager:** \_\_\_\_\_**Project Background** (Documents what initiated the project)**Project Objectives** (Documents the purpose, goals and benefits of the project.)**Stakeholders** (anyone with a vested interest in the project or who will be - positively or negatively - affected by the project)

<b>Name</b>	<b>Title</b>	<b>Dept./Co.</b>	<b>Phone</b>	<b>Fax</b>	<b>E-mail</b>

**Areas Affected**

Locations or Regions
Departments
Existing Business Processes
Existing Products
Existing Services

**Scope** (Defines the boundaries of the project - what's in and what's out)

<b>Deliverables (Internal to the Project)</b>	<b>Accepted Deliverables</b>
<b>Exclusions</b>	<b>Area / Person Responsible or Future Project Release</b>

<b>Constraints</b> ( <i>Known</i> factors that are limiting the project.)
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**High Level Risks** (Identifies factors that *may* derail the success of the project.)

<b>Assumptions</b> (predictions for outstanding issues/decisions)	<b>Decision Maker</b>	<b>Date Req'd</b>	<b>Official Decision Made</b>	<b>Date Made</b>
<p><b>Outstanding decision/issue:</b></p> <p><b>Assumption/predicted direction:</b></p>				
<p><b>Outstanding decision/issue:</b></p> <p><b>Assumption/predicted direction:</b></p>				

<b>Success Indicators</b> (Documents the ways success of the project will be measured. Remember SMART)	<b>Measured by</b>

