

A group of hikers with backpacks is walking up a snowy mountain slope. The sun is shining brightly in the sky, creating a lens flare effect. The hikers are in the foreground, and the snow-covered mountain extends into the distance. The sky is blue with some clouds.

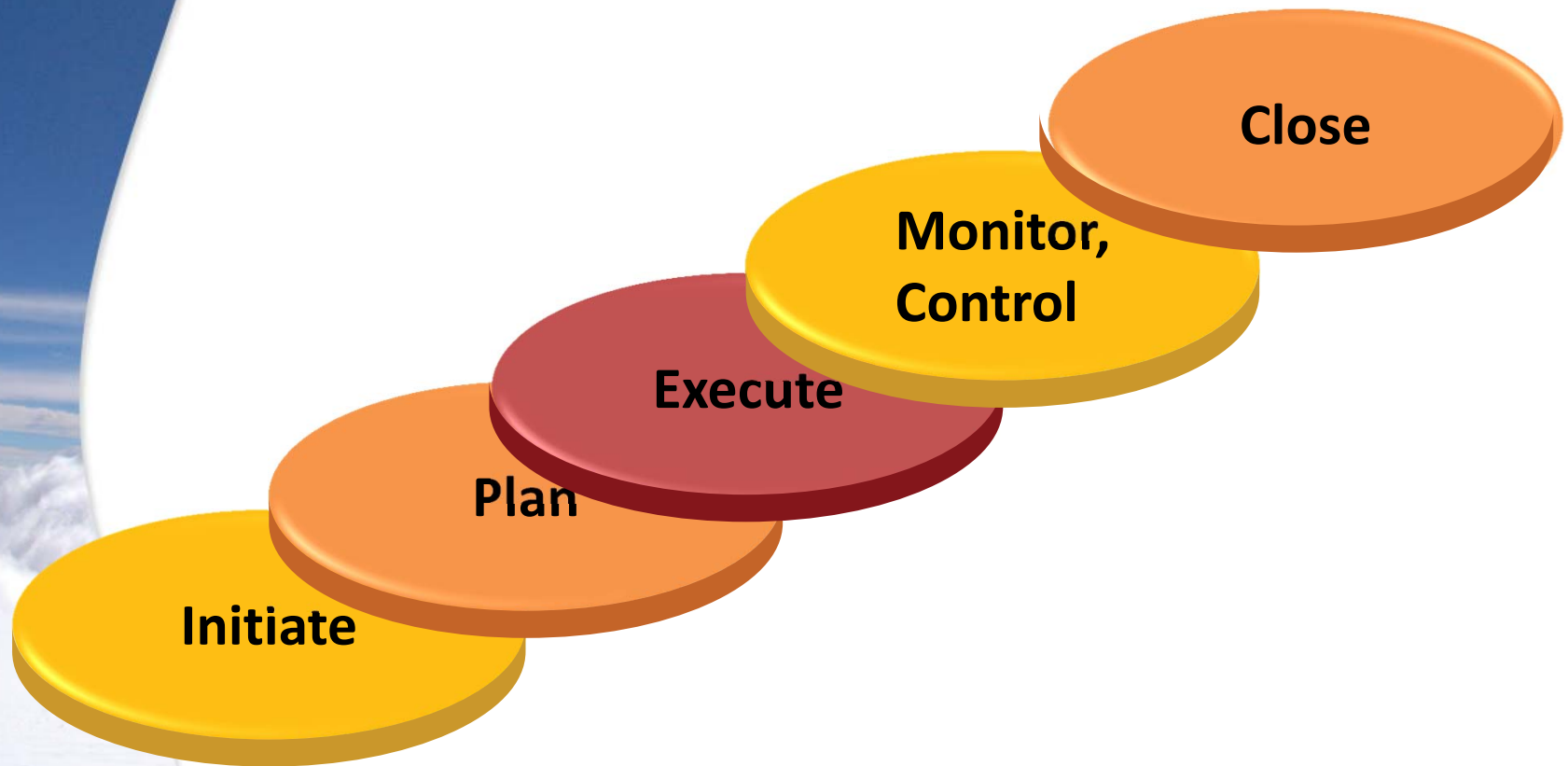
# Managing Through the Chaos: Your IR Office & Project Management

The University of Texas System  
Office of Strategic Initiatives

# Chaos of an Institutional Research Office



# 5 Key Elements of Project Management





# Charter Initiates the Project

- ❖ Provides a high-level description of the project, so that detailed requirements can be developed
- ❖ Defines high-level milestones, budget summary, and project approval
- ❖ May include: proposed scope, defined financial resources, project risks, and list of stakeholders

*“Issued by the project initiator or sponsor that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources to project activities.” PMBOK*

# Project Scope

## May include:

- ❖ Provides baseline to evaluate work that is within the project's boundaries
- ❖ Contains specific detail to manage expectations
- ❖ Enables the team to perform more detailed planning
- ❖ Project scope description
- ❖ Acceptance criteria
- ❖ Project deliverables
- ❖ Project exclusions
- ❖ Project constraints
- ❖ What is out of scope

*“The description of the project scope, major deliverables, assumptions and constraints. Can be used to confirm results of project. The project team and customer need to agree to Scope Statement.” PMBOK*



# Project Management Plan

- ❖ Living document progressively updated through the project
- ❖ Provides standardized guidelines and criteria to evaluate proposal and performance
- ❖ Change Control procedures
- ❖ Includes information that may impact current project, but not limited to: historical information, corporate policies, lessons learned, and project documents

*A document issued that describes how the project will be executed, monitored, planned and closed.*

# Project Documents (Execute)

## May include:

- ❖ Requirement Documentation
- ❖ Project Schedule
- ❖ Process Documentation
- ❖ Project Logs
- ❖ Risk Register
- ❖ Cost Documentation
- ❖ Agreements
- ❖ Communication Documentation
- ❖ Quality Audit Reports & Change Logs
- ❖ Human Resource Documentation
- ❖ Procurement Documents
- ❖ Stakeholder Register

*Subsidiary documents used to support the Project Management Plan and are utilized to manage the project. May influence quality assurance and should be monitored.*

# The Genie Magic



A project manager, a software engineer, and a hardware engineer are helping out on a project. About midweek they decide to walk up and down the beach during their lunch hour. Halfway up the beach, they stumbled upon a lamp. As they rub the lamp a genie appears and says, "I will grant you each one wish."

The hardware engineer went first. "I would like to spend the rest of my life living in a huge house in St. Thomas with no money worries." The genie granted him his wish and sent him on off to St. Thomas.

The software engineer went next. "I would like to spend the rest of my life living on a huge yacht cruising the Mediterranean with no money worries." The genie granted him his wish and sent him off to the Mediterranean.

Last, but not least, it was the project manager's turn. "And what would your wish be?" asked the genie. "I want them both back after lunch" replied the project manager.



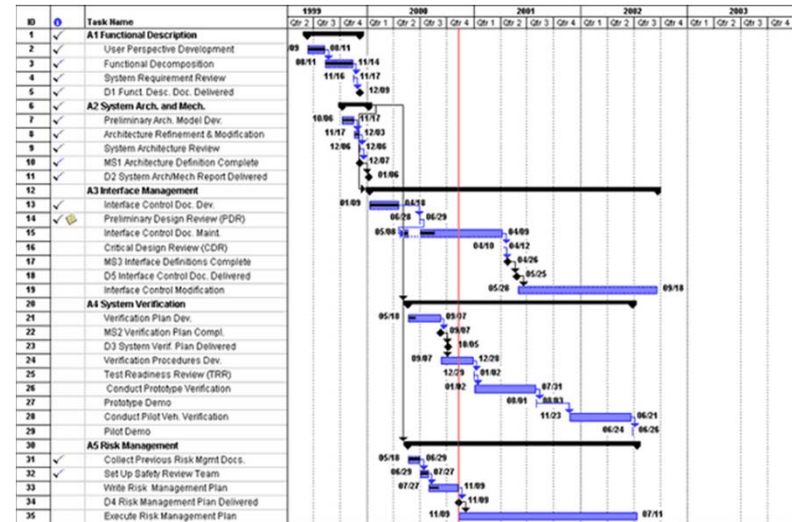
# Project Schedule (Monitor)

## May include:

- ❖ Milestones
- ❖ Activities
- ❖ Deliverables
- ❖ Start & End Dates
- ❖ Resources
- ❖ Traceability

## Benefits:

- ❖ Provides a goal
- ❖ Reduces cost and time
- ❖ Improves communication
- ❖ Spots potential problems early in the project



*A schedule or a timetable is a basic time management tool consisting of a list of times at which possible tasks, events, or actions are intended to take place*

# Risk Register

(Monitor)

## May include:

- ❖ Description of the risk
- ❖ Impact if this event occurs
- ❖ Probability of occurrence
- ❖ Planned response if event occurs
- ❖ Summary of mitigation

## Benefits:

- ❖ Understand the risk
- ❖ Identify risk tolerance
- ❖ Control and reduce risk
- ❖ Risk status



*A document in which the results of risk analysis and risk response planning are recorded. It acts as a central repository for all risks identified for the project.*



# How Does this Relate to My IR Office?

## **Reoccurring Projects:**

- ❖ Texas Higher Education Coordinating Board Reports (repeat)
- ❖ IPEDS Reports
- ❖ Instructional evaluations
- ❖ Regular data pulls

## **Long Term Projects:**

- ❖ Special initiatives from the President, Provost or your manager
- ❖ Research Projects
- ❖ Software migration with your institution or department

## **Ad-hoc & Short Term Requests**



# Stakeholders

- ❖ Useful to create a register for one location to list stakeholder contact information
- ❖ Registers include key interests, contributions and expectations with the project
- ❖ Define engagement levels and communication requirements
- ❖ Reinforces value of the stakeholders



*A stakeholder is an individual, group, or organization who may affect, be affected by, or perceived itself to be affected by a decision, activity, or outcome of a project.*

# Project Closing

- ❖ Project manager reviews documents to ensure objectives are complete
- ❖ Project may be transferred to another group for operations
- ❖ Includes activities to collect records, audit success / failure, gather lessons learned and archive project information
- ❖ Formal ending of the project



*Describes the process of finalizing all activities across all of the Project Management Process Groups to formally complete the project or phase.*

# 5 Key Elements of Project Management in an IR Office

**Initiate = Charter**

**Plan = Project Plan**

**Execute = Schedule**

**Monitor, = Schedule &  
Control Risk Register**

**Close = Lessons Learned**

# Triple Constraint



***FAST – CHEAP – GOOD!!!***





# Top 10 Reasons Not to Use Project Management

10. Our customers really love us, so they don't care if our projects are late or not quite right.
9. Organizing to manage projects isn't compatible with our culture, and the last thing we need around this place is change.
8. All our projects are easy, and they don't have cost, schedule, or risks anyway.
7. We can't implement project management without stifling creativity and offending our geniuses.
6. We might have to understand our customers' requirements and document a lot of stuff, and that is such a bother.
5. Project management requires integrity and courage, and we're not into that.
4. We don't need a project manager. That's just one more manager to slow us down.
3. We'd have to apply project management blindly to all projects regardless of size and complexity, and that would be insane.
2. I know there is a well-developed project management body of knowledge, but I can't find it under the mess on my desk.
1. Our bosses won't provide the support needed for project management, they want us to get better results through magic.



**Questions?  
Comments?**



# Contact Information

Elizabeth Cockerham  
Project Manager  
ecockerham@utsystem.edu  
512-499-4358

Miriam McKinney  
Institutional Research Analyst  
mmckinney@utsystem.edu  
512-499-4738

