

Project Management:

A Design by the Project Management Task Force

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The American Academy of Ambulatory Care Nursing (AAACN) identified the need for a tool to assist in completing short-term and long-term projects, as well as achieving expected outcomes and deliverables. To meet this need, the AAACN Board of Directors established a task force to strategically research and develop a tool for efficient and effective project management. Once completed, this tool would aim to provide a clear guide to assist project teams in identifying essential tasks necessary to accomplish the work, and it would manage time lines, milestones, and deliverables of any project.

In November 2004, a Project Management Task Force of Air Force and Navy nurses was established to research the literature on project management and develop a tool and process for managing all projects from conception to completion. Capt. Sara Marks, NC, USN, was assigned as the Board liaison, and she oversaw the work of the Task Force. Members of the Task Force included Lt. Col. Vivian Harris, USAF, NC; Lt. Col. Dixie Lyon, USAF, NC (Ret); Lt. Cdr. Michael J. Allanson, USN, NC; Maj. Judy Gavin, USAF, NC; Maj. Anna Righero, USAF, NC; and Pat Reichart, AAACN association services manager.

The goals of the Task Force were to:

- Research ways projects can be managed.
- Devise a project management tool for AAACN.
- Brief the completed product at AAACN Leadership Symposium, held during AAACN's 30th Anniversary Conference in April 2005.

The working group met via teleconferences for over three months. They conducted a thorough review of the literature on project management that included tools available to assist with project management. After a comprehensive review, the "Project Management Focus Document," developed by the Air Force Medical Support Agency, Population Health Support Division, Brooks City-Base, San Antonio, Texas, was determined to be the easiest to modify and was selected as the model that would best fit AAACN's needs for managing projects.

Project Management Process Life Cycle Model

Benchmarking from this focus document, the Task Force developed the "Project Management Process Life Cycle Model" as an algorithm for depicting processes and/or activities needed to manage all phases of projects regardless of the size of the project. This model groups tasks into four phases:

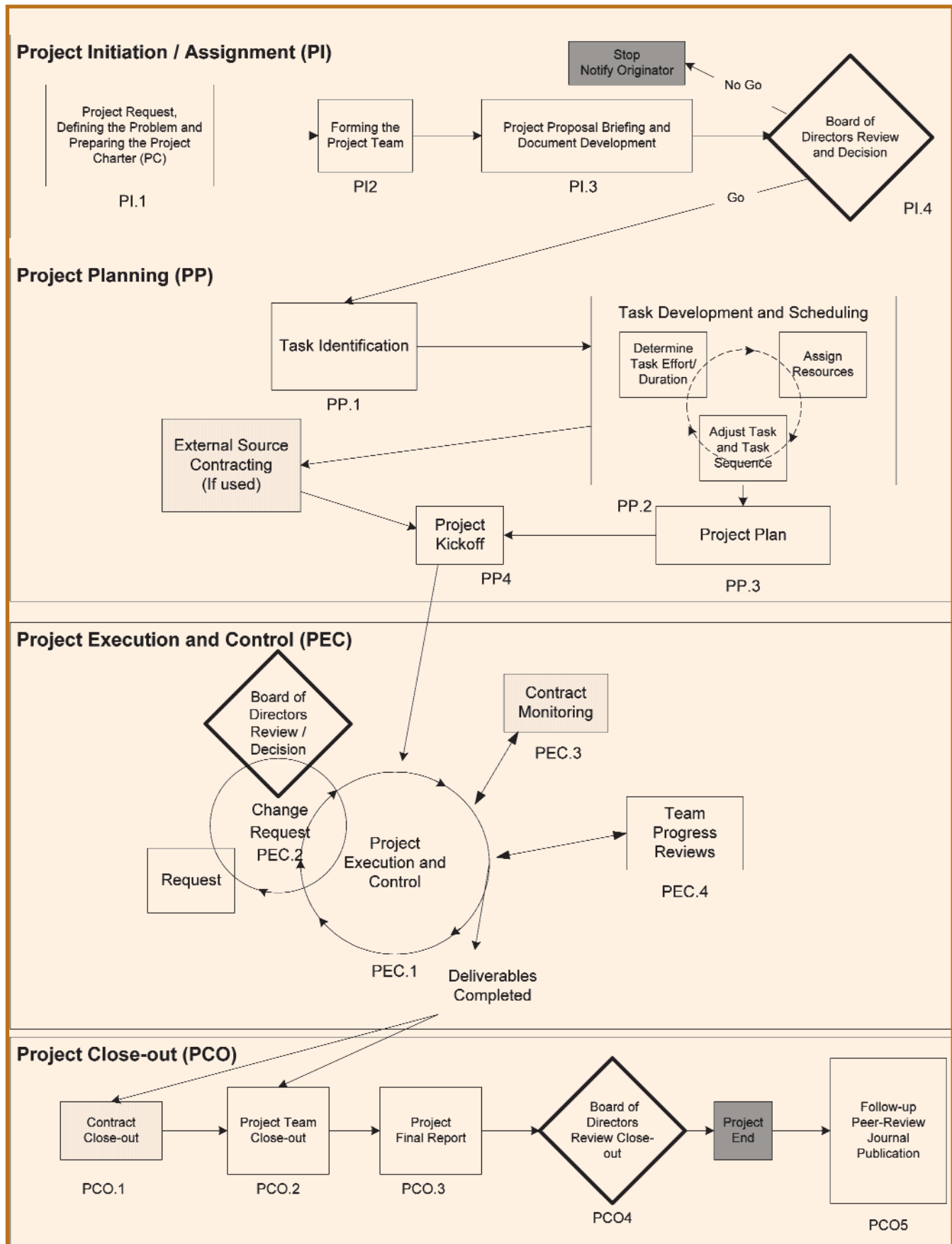
- Phase 1: Project Initiation or Assignment (PI).
- Phase 2: Project Planning (PP).
- Phase 3: Project Execution and Control (PEC).
- Phase 4: Project Close-Out (PCO).

Additionally, the team developed a Project Management Form (working document) that clearly articulates the key elements identified in each phase of the Life Cycle and can be used by the project teams to track and monitor team progress (see Figure 1).

Phase 1: Project Initiation or Assignment (PI)

This phase is critical for the start-up of any project. During this phase, the problem must be clearly identified, stated, and understood to be a true "problem" before a project proposal can be made. The proposal is written and a charter is developed. The charter must clearly state the title and purpose of the project; project team members (to include naming the project manager); parameters of the project; the goals, outcomes, and deliverables of the project team; resources that may be needed to complete the project; and the time frames for completion of the project. In addition, the charter must be approved by the AAACN Board of Directors. The project manager is responsible for determining the number of team members, as well as the experience and expertise needed to work on the project. The manager is also responsible for keeping the board liaison abreast of progress by submitting a project progress report to AAACN Board of Directors' tri-annual meetings. Progress reports should be submitted until the project concludes and is approved by the AAACN Board of Directors.

Figure 1.
Project Management Process Life Cycle



Phase 2: Project Planning (PP)

Once the team is established, project planning begins. In this phase, tasks are identified and scheduling takes place. Tasks are determined and assigned to team members who are responsible for completing the work within a specific time frame. Tasks and timelines should be reasonable with realistic completion dates, and team members should have a clear understanding of the objectives and goals of the project. As a result of this planning, a formal project plan is documented for tracking purposes. Once this is formulated, there should be a project kick-off. This is usually conducted with customers and stakeholders so that they understand the project and it is what they had envisioned. If the project is outsourced, the kick-off should include the hired contractors because they will be responsible for briefing their plan to the group. Occasionally during the kick-off meeting, there will be adjustments made to the plan based on the customers' and stakeholders' needs and expectations.

Phase 3: Project Execution and Control (PEC)

Execution and control of the project is a dynamic process. It includes delineating the roles and responsibilities of team members, frequency or group meetings, and how the group will meet (such as monthly and/or bimonthly teleconferences or face-face meetings). The project manager is critical to this phase. He or she is responsible for reviewing the work of the team to ensure that milestones and goals are being met and tracked. Project barriers or challenges are appropriately addressed to keep the project on target. Any and all changes proposed will be briefed by the project manager to the Board liaison for review, discussion, and approval. The execution and control phase can be considered the lynch-pin of the project and continues throughout the life of the project.

Phase 4: Project Close-Out (PCO)

As the project nears completion or close out, the project outcomes and deliverables may need to be reviewed by an internal review board established by the Board of Directors. This review board should be the "objective" audience for the project briefing to ensure that the outcomes and/or deliverables are met and that the briefing is concise and succinct. The final product should be presented to the AAACN Board of Directors for approval and a final report should be submitted to AAACN in a package that includes an executive summary, table of contents, the actual report, glossary of terms, and a bibliography of all references cited. Once the board has reviewed the final product, any recommendations for changes will be completed and the final package approved.

Conclusion

In April 2005, Lt. Col. Vivian Harris, team leader for the Task Force; Maj. Judy Gavin; and Lt. Cdr. Michael Allanson presented their completed project to the AAACN Board of Directors at the AAACN National Conference in San Diego, CA. The Project Management Focus Document was

approved by the Board of Directors and was adopted as the working document and tool for all AAACN projects.

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Additional Readings

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