

Building Leadership for Health

Leading Project Management for Health

Notes for Course Leaders

- ❑ This is a toolkit to develop your own course
 - ❑ You may wish to involve a local expert in project management
 - ❑ You should relate this to your own examples of good practice in managing projects
 - ❑ Slides are discussion points rather than a lecture
 - ❑ There are many books available on this subject
 - See <http://www.pmtoday.co.uk/>
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Leading Project Management for Health: Agenda

- Introduction and Learning objectives 25 mins
 - Project Management: discussion 60 mins
 - Coffee 15 mins
 - Project management : case study 60 mins
 - Discussion 30 mins
 - Lunch 45 mins
 - Case study 60 mins
 - Discussion: Tips on Project Management 45 mins
 - Coffee 15 mins
 - Managing Project Risk discussion 15 mins
 - Reflections, learning logs feedback 25 minutes
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Introductions

- Describe your experience of work on major projects
 - Was the project successful or did it fail?
 - Was it completed on time and within budget?
 - Was the project well managed?
 - What helped and what hindered?
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Learning Objectives

- The group learning objective is
 - To share a common understanding of project management and its application to health sector problems.
 - In thinking about your learning objectives you need to consider
 - Whether you need to learn to direct project management as a project board member
 - Whether you might be a project manager yourself or
 - Whether you might be a member of a project team
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Project Management *Defined*

□ Project

- **A series of related tasks directed toward a clear outcome by a given date, requiring significant resources and time.**

□ Project Management

- **The management activities of leading, planning, directing, and controlling resources (people, equipment, material) to meet the quality, cost, and time objective to achieve the desired outcome.**
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Project Management

What it is not

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- ❑ Project management is not suitable when there is no clear outcome or end point.
 - ❑ It does not apply to the work of committees it requires input of a team of people working together
 - ❑ You can use some of the terms and ideas in relation to a project carried out by one person but this does not require the full discipline of project management
 - ❑ Very large scale developments may include self contained projects within a larger programme
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When to use Project Management

- ❑ Conduct a brief brainstorm of potential issues in your health system which might require project management
 - ❑ Discuss which issues are in fact suitable and which are not so suitable for project management
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Phases of Project Management

- Project preparation
 - Definition of objectives, scope, outcome, risks outline resources, business case, project management structure
 - Set out in a Project Initiation Document (PID)
 - Project planning
 - Outline tasks, leadership, resources
 - Implementation control plan, Gantt Chart, Milestones
 - Implementation
 - Communications and celebration
 - Project leadership and management
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Project Preparation: Business Case

- ❑ Business case sets out costs/ benefits
 - ❑ It is updated throughout the process
 - ❑ It is the basis for project evaluation
 - ❑ Can lead to termination if negative
 - ❑ At any stage in the process
 - ❑ Or even before you start
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Project preparation

- Define outcome of the case study project
 - What will be achieved by when
 - How will you know if this has been achieved

Define scope

- What is included and what is excluded
 - Set objectives that are SMART:
 - Specific,
 - Measurable,
 - Achievable,
 - Relevant,
 - Time bound.
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Project preparation

- Identify risks
 - What can go wrong and what you will do about it
 - Outline of resources
 - Budget, time of people- how this will be provided
 - Project management structure
 - A project board
 - A project manager
 - The project team
 - Project quality assurance
 - Project Initiation Document (PID)
 - Sets out the above
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Case study: Project Preparation

- ❑ You have to move into a new surgery block, which is being built and will be complete in 4 months except for equipment.
 - ❑ Current units have different equipment, much needs replacing the total budget of \$50,000 is half what they say they need
 - ❑ Management and procedures of the units are very different, new theatre management arrangements must be agreed.
 - ❑ New staff structures and retraining will be needed
 - ❑ Two existing units will be demolished in 5 months time
 - ❑ It takes 3 months to deliver new equipment
 - ❑ People need 1 month training to use new equipment
 - ❑ Head surgeons from the 2 units refuse to speak to one another each claim they must be leader of the new unit
 - ❑ They claim design of the new units is wrong and want alterations before moving in, there is no budget for this.
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Example solution: Outcomes

□ Project outcome

- Two surgery units combined into one management unit equipped and operated by trained and motivated staff within 5 months and a budget of \$50,000. Outcome and objectives will be agreed by a project board.

□ Scope

- Includes management and operational training aspects equipment and minor building works, excludes major building works and professional training.

□ Objectives to be agreed by the Project Board

- New unit to achieve throughput of two old units plus 10%
 - Infection control improved - 20% reduction in morbidity
 - Improved morale as measured by attitudes and turn over
 - Less waste and inefficiency 20% less cancelled operations
 - Improved outcomes 10% improvement in mortality rates
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Example solution: Risks and Resources

Risks

- Surgeons fail to agree one of them leaves
 - Seek replacement at early stage
- Fail to meet deadlines work disrupted
 - Send staff to other hospitals for equipment training
- Management arrangements inadequate
 - Seek expert advice
- Equipment inadequate
 - Seek expert advice increase budget by reducing current workload

Resources

- \$50,000 plus \$5,000 from current unit operating budget
- Team of three people for 3-5 months
- Plus time from other staff of the units
- Obtain resources by reducing workload for 5 months

Example solution

□ Project Board

- Chaired by CEO
- Director of Medicine
- Two current lead surgeons
- Head of nursing
- Leading surgeon from another hospital

□ Project Team

- Project manager with relevant training
- Two technically able people from surgery units
- Support from Works and Personnel Departments

□ Quality assurance

- See milestones and quality assurance
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Project Planning: discuss

- Task plan (Sometimes called work breakdown structure)
 - What needs to be done
 - How long is needed
 - Organise into areas of activity
 - Assign responsibilities
 - Estimate resources
 - Project control Plan
 - Sequence of actions
 - Overall schedule of resources
 - Identify milestones (points at which progress is checked)
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Milestones and quality assurance

- Milestones are key points at which intermediate outputs are to be delivered
 - Discuss the milestones you would need in this case
 - For each milestone you need to establish how you would review the quality of the output.
 - How will you determine acceptability at each stage
 - This is the project quality assurance programme!
 - What would you suggest in this case?
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Example solution

1.0 Develop Management Proposals

- 1.1 Communicate with staff of existing unit
- 1.2 Review current procedures and management of 2 units
- 1.3 Compare with best practice in other hospitals
- 1.4 Workshop to propose operation plan for new unit
- 1.5 Prepare proposals for project board

2.0 Review of equipment and building changes

- 2.1 Review equipment in current units
 - 2.2 Examine equipment in best practice hospitals
 - 2.3 Evaluate priority for and cost of equipment renewal
 - 2.4 Review any proposals for building modifications
 - 2.5 Make proposals for equipment and building modifications
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Example solution

3.0 Staff and training needs assessment

- 3.1 Contingency plan for recruitment of new head of surgery
- 3.2 Draw up detailed plan for staffing
- 3.3 Define training needs arising from new structure
- 3.4 Define training needs arising from new equipment

4.0 Equipment and building modifications

- 4.1 Design layout and prepare detailed specifications
 - 4.2 Order equipment and building modifications
 - 4.3 Plan movement of existing equipment
 - 4.4 Building modifications
 - 4.5 Installation of new equipment
 - 4.6 Movement of existing equipment
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Example solution

5.0 Staff recruitment and training

5.1 Advertise posts

5.2 Interview existing staff for new posts and appoint

5.3 Interview new staff if needed and appoint

5.4 Arrange equipment training at other hospitals

5.5 Conduct operational training sessions for staff

6.0 Open new unit

6.1 Detail plan for movement day

6.2 Detailed plan for opening ceremony and celebration

6.3 Movement day

6.4 Official opening day

Example: Milestones and QA

- ❑ Paper on new management arrangements week 4
- ❑ List of equipment + minor building changes week 6
- ❑ Staffing and training needs assessment week 8
- ❑ Delivery and install equipment week 18
- ❑ Staff training weeks 14-18
- ❑ Opening of new unit week 20
- ❑ In this case it was decided that the Project Board would form the quality assurance team*
- ❑ *This is not ideal independent review would be better.

Identify Resource Requirements

- ❑ What are the resources necessary to complete each task?
 - People (by specialty)
 - Materials
 - Equipment
 - ❑ The resources requirements provide the basis for your cost estimation
 - ❑ It is essential to identify who will be responsible for each element and each task
 - ❑ The project board must meet on the dates set for review of the milestones
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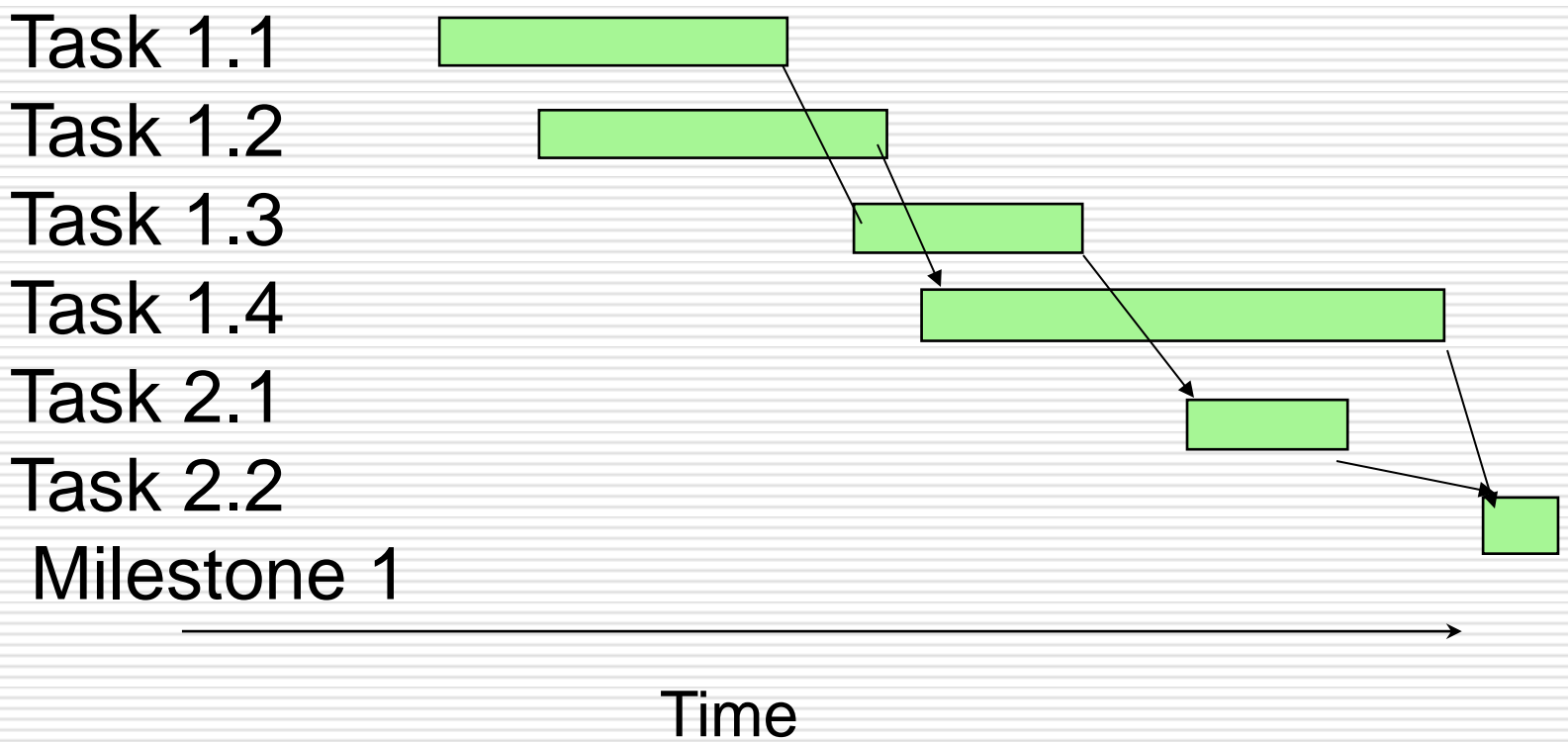
Preparing a Project Control Plan

- ❑ List the tasks down the left hand side
 - ❑ Draw a timeline across the page
 - ❑ Note the Milestone dates
 - ❑ Set out time lines for each task
 - ❑ Link tasks where one depends on another (e.g. 1.1, 1.2 and 1.3 before 1.4)
 - ❑ Or where for practical reasons they go together (e.g. 1.3 and 2.2)
 - ❑ Add up people needed each day of the plan (this may also require you to shift tasks)
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Project Control Charts: Gantt Chart

Vertical Axis:
Tasks

Horizontal bars used to denote time.



Project Control Plan: Exercise

- ❑ Prepare a project control plan - Gantt chart for the case study.
 - ❑ Make your own estimates of how much time and input is required for each task
 - ❑ You will usually find the first version does not work you have to make compromises or draw in additional resources.
 - ❑ Discuss and change plans until you have a realistic plan which achieves the outcome.
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Using the Project Control Plan

- Links between tasks define the critical path
 - That is those tasks which define the shortest time a project can be completed.
 - These are the most critical to the overall timescale of the project
 - To reduce the critical path you may need to reduce dependencies in this case you do not have time to train people on equipment after it arrives so send them to another hospital.
 - You may also need to take contingent action as in this case you need to plan to replace a surgeon just in case one quits.
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Project Management Practice

- ❑ There are many proprietary approaches to project management
 - ❑ And a great variety of PC based project management tools.
 - ❑ We suggest you should use this broad overview of project management before plunging into these detailed approaches
 - ❑ Computer generated charts produce neat reports but it is often helpful to sketch the chart by hand before using such tools
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Project Management Practice

- The most important task of a project manager is not to prepare plans or charts but to provide leadership to the project
 - You need skills in managing people
 - In leading change in
 - Communications and in
 - Dealing with finance
 - Discuss the leadership challenges the project manager will face in the case study.
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Project Management Practice

- ❑ As in so many areas communications are crucial to project management you have to keep contact with staff who will be affected the project board and the project team at all times
 - ❑ Agree a time budget for each person working on the project otherwise you will just get meetings.
 - ❑ The team must be named individuals do not accept department inputs.
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Project Management Practice

- ❑ A neat Gantt chart probably means it has never been used!- you need to revise it often.
 - ❑ Always budget time for things to go wrong, so build in contingency or “float time” during planning and ask for reports days before the deadline
 - ❑ Something always goes wrong on every project so don't panic
 - ❑ A team meeting can often produce creative short cuts when things look impossible!
 - ❑ Celebrate success when you reach a milestone otherwise people only remember the problems!
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Managing Project Risk

Murphy's Law

“Whatever can go wrong will”

What is Project Risk Management?

- The goal of project risk management is to minimize potential risks while maximizing potential opportunities. Major processes include
 - Risk identification: determining which risks are likely to affect a project
 - Risk quantification: evaluating risks to assess the range of possible project outcomes
 - Risk response development: taking steps to enhance opportunities and developing responses to threats
 - Discuss the risks involved in the case study and what you would do about them
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Leadership **of** Project Management

- ❑ Leadership is required both within PM
 - ❑ And of organizational approach to PM
 - ❑ Leaders define what PM approach to use
 - For Example UK NHS uses Prince2 approach*
 - ❑ And when to apply PM
 - ❑ Also reinforce PM disciplines
 - ❑ And recognise good practice in PM
 - ❑ *A Guide to Project Management in the NHS [here](#)
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Reflections and Feedback

- Please discuss and write down
 - What you have learnt that you found helpful
 - What you will do differently as a result of today
 - What you will improve when you give this course
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