

# Project Management / Change Management

## **Purpose**

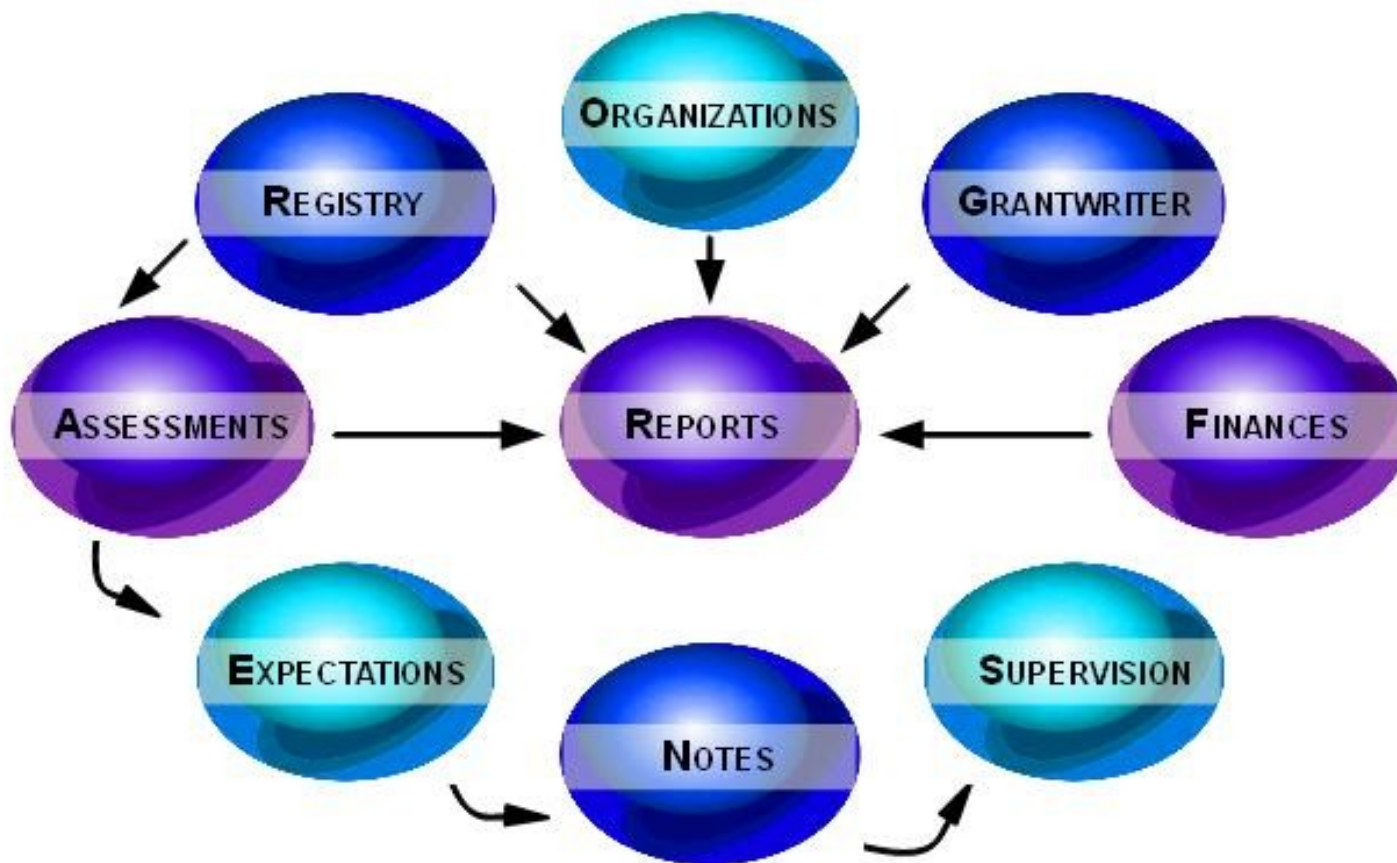
→ Maximize results for the persons and community that produce information and knowledge that drive progress

## **Methods**

- Increase management capacity of grassroots organizations
- Optimize resource utilization and competitiveness

## **Results**

- Sustainable development & innovation
- Pedagogical building of insight and teamwork



## INTEGRATED MANAGEMENT

**The modules connect so that there is efficiency in data entry:  
Each entry populates all relevant work areas.**



**The  
Specs  
Are  
Published**

- I
- II
- III
- IV
- V
- VI
- VII
- VIII
- IX
- X



## GRANT WRITER

**The Quality Control system is built from the RFP deliverables.**

[http://commons.wikimedia.org/wiki/File:Moses\\_Copenhagen.jpg](http://commons.wikimedia.org/wiki/File:Moses_Copenhagen.jpg)

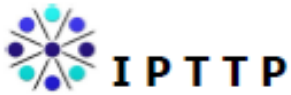
<http://commons.wikimedia.org/wiki/File:Computer-blue.svg>

# Analyze Grant Requirements and Write the Proposal

2010	RFP ID 3828, County of S.D.,		Responsible
WBS ID#	AOD Prevention Services, Initiative Facilitation	Dep.	Person
01.01	Project Start-Up - First 30 Days	100	R.
01.03.02	Project Personnel	100	L.
01.03.02.01	Program Director - R	100	J.H
01.03.02.06	Administrator - L	100	R.
01.03.02.05	Law Enforcement Liaison - T	100	R.
01.03.02.02	Prevention Specialist	100	R.
01.03.02.03	Media Specialist	100	R.
01.03.02.04	Youth Coordinator	100	M
01.03.02.07	Subcontractors	101	L.

**The analysis of deliverables yields a Work Breakdown Structure (WBS) that responds exactly to the requirements of the RFP. The reorganized matrix reflects the logical workflow of implementation and the dependencies of outputs.**

# Analyze Grant Requirements and Write the Proposal



P.O. Box 3483 San Diego CA 92163

4/18/2010

Page 1/10

---

## Community Information Report

### High Risk - Underage Drinking Initiative

URL: RFP ID 3828, County of S.D.

Active Status: Yes

Source: AOD Prevention Services, Initiative Facilitation

Contact: Metro United Methodist Urban Ministry

### Report Data

---

Title M U 02.00 Program Description

Condition 02.01 Program Design & Services Description

Ingredient 02.01.01 Alcohol Policy Panel Coalition (APPC)

Measurement Q C (-1) | (0) | (1) 02.01.01.01 SDAPP Baseline Assessment 0

**Management uses the Work Breakdown Structure (WBS) to organize subsequent data collection. The Project Management result: efficient, effective review of dependencies & outputs.**



**The WBS outlines deliverables used in supervision. Assessments and activities available to staff are calibrated to the WBS. Prime benefits are the prevention of drift or confusion, and focus on the mission by the team.**

[http://commons.wikimedia.org/wiki/File:Sphere\\_wireframe.svg](http://commons.wikimedia.org/wiki/File:Sphere_wireframe.svg)

[http://commons.wikimedia.org/wiki/File:Hawaiian\\_Applique\\_Quilt\\_2.jpg](http://commons.wikimedia.org/wiki/File:Hawaiian_Applique_Quilt_2.jpg)

# Manage Projects and Programs

2010 WBS ID#	RFP ID 3828, County of S.D., AOD Prevention Services, Initiative Facilitation	Order	Path	Dep.	Responsible Person	Target Dates and Milestones (X="Done")	Month & Day						
							"X"	07	08	09	10	11	12
01.01	Project Start-Up - First 30 Days	100	100	100	R	Infrastructure complete		30					
01.03.02	Project Personnel	110	101	100	L	Staff hired		30					
01.03.02.07	Subcontractors	120	103	101	L	Contracts deployed		30					
01.03.05	Technical Assistance Plan	130	104	102	R	Training plans developed, use research & evaluation			15				
01.03.05.05	Training Topics	131	105	104	M	Training presentations written				1			
01.03.05.03	Training Implementation	150	106	105	R	Training completed					15		
01.03.05.04	Training Material Dissemination	160	107	105	L	Training materials published							1
02.01.01.03	Alcohol Policy Panel Coalition (APPC) Start	201	200	200	R	Coalition is operational							5
02.01.02	APPC Executive Committee (APPC-EC)	202	201	201	J.	Coalition leadership is elected							5
02.01.04	Adoption of SDAPP Mission, Recommendations & Campaign Goals	203	203	202	R	Coalition adopts foundation laid by SDAPP							5
02.01.02.05	APPC - Workgroups	204	202	202	R	Coalition workgroups are set up							30
02.01.03	Training - Technical Assistance to APPC	204	204	131	Pr	Technical assistance to coalition begins							15
02.01.02.06	APPC Environmental Prevention Strategy (EPS) - 4 Work Plans	207	207	204	Pr	Coalition ratifies strategy & methods							30
02.01.05	EPS Implementation Action Plans (Work plan matrix)	208	208	207	R	Feedback plan with measurable benchmarks set for 6 teams				1			
02.01.05.02	Operational Goals for the Workgroups	210	210	209	R	Q C and Q A set for workgroups					15		
02.01.05.03	Operational Evaluation	211	211	300	V	SYL deliverables evaluated, real-time/scheduled							15
02.01.09	Reduce alcohol-related traffic injuries - fatalities	211	211	300	R	Progress on strategic goal reviewed, real-time/scheduled							30
02.01.06	Coordination with county providers for evaluation & media	300	300	300	M	EPS deliverables put into play					15		

**The dependencies represented in a Gantt chart are codified in the WBS. The pathway to each milestone is registered, the reference marker is pegged to the WBS.**

# Manage Projects and Programs



## Registration Associations: Add / Create

Tecumsah Tubman - EMPOWERMEIT 92111

Yes = New Registration  Yes  No No = Unregistered  
 (A person or WBS item that appears on the list of staff assignments is "Registered".)

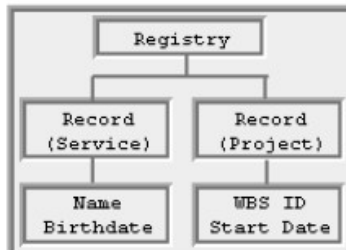
Enter the Name and Date of Birth or WBS ID and Start Date for the Registration

First	Middle	Last	Suffix	D.O.B.
ZZZZ	ZZZZ	ZZZZ		1/1/1901

OR

Auto-Enter from previously entered data:

Reasons to select from a list:  
 Create a new Record # for a previously entered Registration.  
 Copy data previously entered to reduce typing.



## Project Integration Management

### 4.1 Develop Project Charter

- .1 Inputs
  - .1 Project statement of work
  - .2 Business case
  - .3 Contract
  - .4 Enterprise environmental factors
  - .5 Organizational process assets
- .2 Tools & Techniques
  - .1 Expert judgment
- .3 Outputs
  - .1 Project charter

### 4.2 Develop Project Management Plan

- .1 Inputs
  - .1 Project charter
- .2 Outputs from planning processes
  - .3 Enterprise environmental factors
  - .4 Organizational process assets
- .2 Tools & Techniques
  - .1 Expert judgment
- .3 Outputs
  - .1 Project management plan

### 4.3 Direct and Manage Project Execution

- .1 Inputs
  - .1 Project management plan
  - .2 Approved change requests
  - .3 Enterprise environmental factors
  - .4 Organizational process assets
- .2 Tools & Techniques
  - .1 Expert judgment
  - .2 Project management information system
- .3 Outputs
  - .1 Deliverables
  - .2 Work performance information
  - .3 Change requests
  - .4 Project management plan updates
  - .5 Project document updates

### 4.4 Monitor and Control Project Work

- .1 Inputs
  - .1 Project management plan
  - .2 Performance reports
  - .3 Enterprise environmental factors
  - .4 Organizational process assets
- .2 Tools & Techniques
  - .1 Expert judgment
- .3 Outputs
  - .1 Change requests
  - .2 Project management plan updates
  - .3 Project document updates

### 4.5 Perform Integrated Change Control

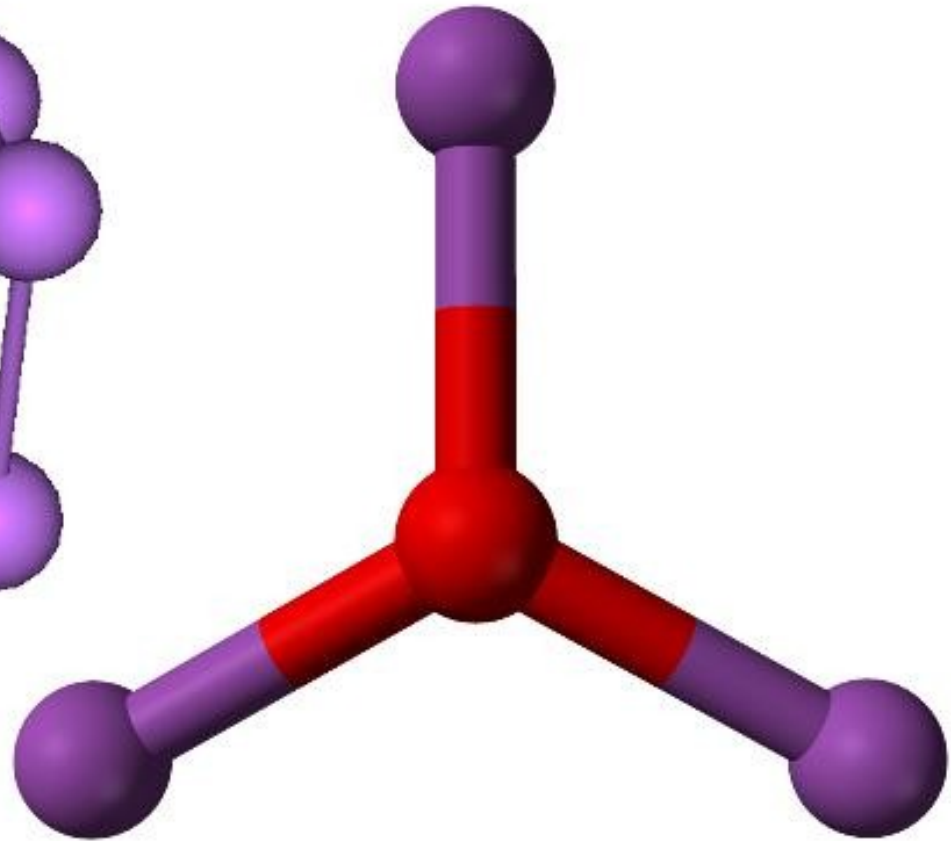
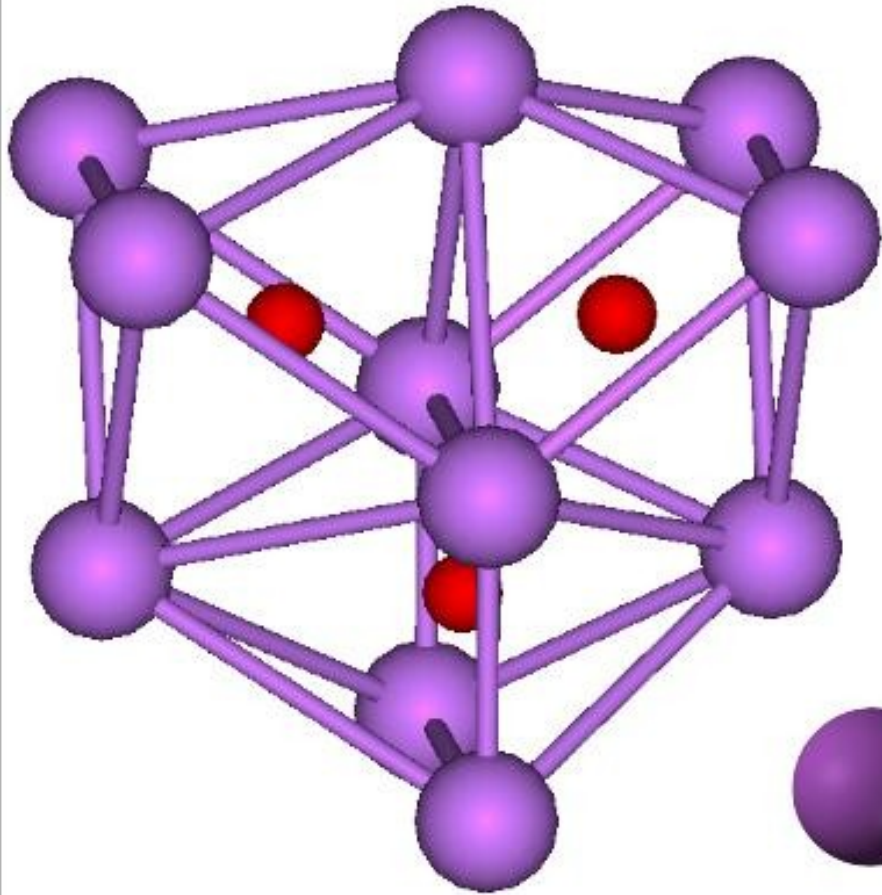
- .1 Inputs
  - .1 Project management plan
  - .2 Work performance information
  - .3 Change requests
  - .4 Enterprise environmental factors
  - .5 Organizational process assets
- .2 Tools & Techniques
  - .1 Expert judgment
  - .2 Change control meetings
- .3 Outputs
  - .1 Change request status updates
  - .2 Project management plan updates

### 4.6 Close Project or Phase

- .1 Inputs
  - .1 Project management plan
  - .2 Accepted deliverables
  - .3 Organizational process assets
- .2 Tools & Techniques
  - .1 Expert judgment
- .3 Outputs
  - .1 Final product, service or result transition
  - .2 Organizational process assets updates

Project Management Institute: *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)* - Fourth Edition, Project Management Institute, Inc. 2008. Copyright and all rights reserved. Material from this publication has been reproduced with the permission of PMI.

**The Registry lists persons and WBS items assigned to staff. Persons and WBS dependencies, entered unregistered, are ready to be used.**



**Complex relationships and pathways to milestones are converted to hierarchically arranged measurements.**

[http://commons.wikimedia.org/wiki/File:Cs11O3\\_cluster.png](http://commons.wikimedia.org/wiki/File:Cs11O3_cluster.png)

<http://upload.wikimedia.org/wikipedia/commons/0/02/Gamma-bismuth-trioxide-O2-coordination-3D-balls.png>



---

**Assessment Title(s)**

---

Title      Condition    Ingredient    Scale       = Inactive

**Y4 Projects & Programs - Y4 02.01 Proj. | Prog.**

**Mapping Youth Assets - Y4 02.01.01 Map Yth Asts**

**Community Assets - Y4 02.01.01.03 Cmnty Assets**

            Neg to Pos - (-1)=Action Needed | (0)=In Progress | (1)=Done

**Personal Assets - Y4 02.01.01.01 Prsnl Asts**

            Neg to Pos - (-1)=Action Needed | (0)=In Progress | (1)=Done

**School Assets - Y4 02.01.01.02 Schl Assets**

            Neg to Pos - (-1)=Action Needed | (0)=In Progress | (1)=Done

**U P A K A - Y4 02.01.02 U P A K A**

**Partnerships - Organizations - Y4 02.01.02.02 Orgnz Prtnrs**

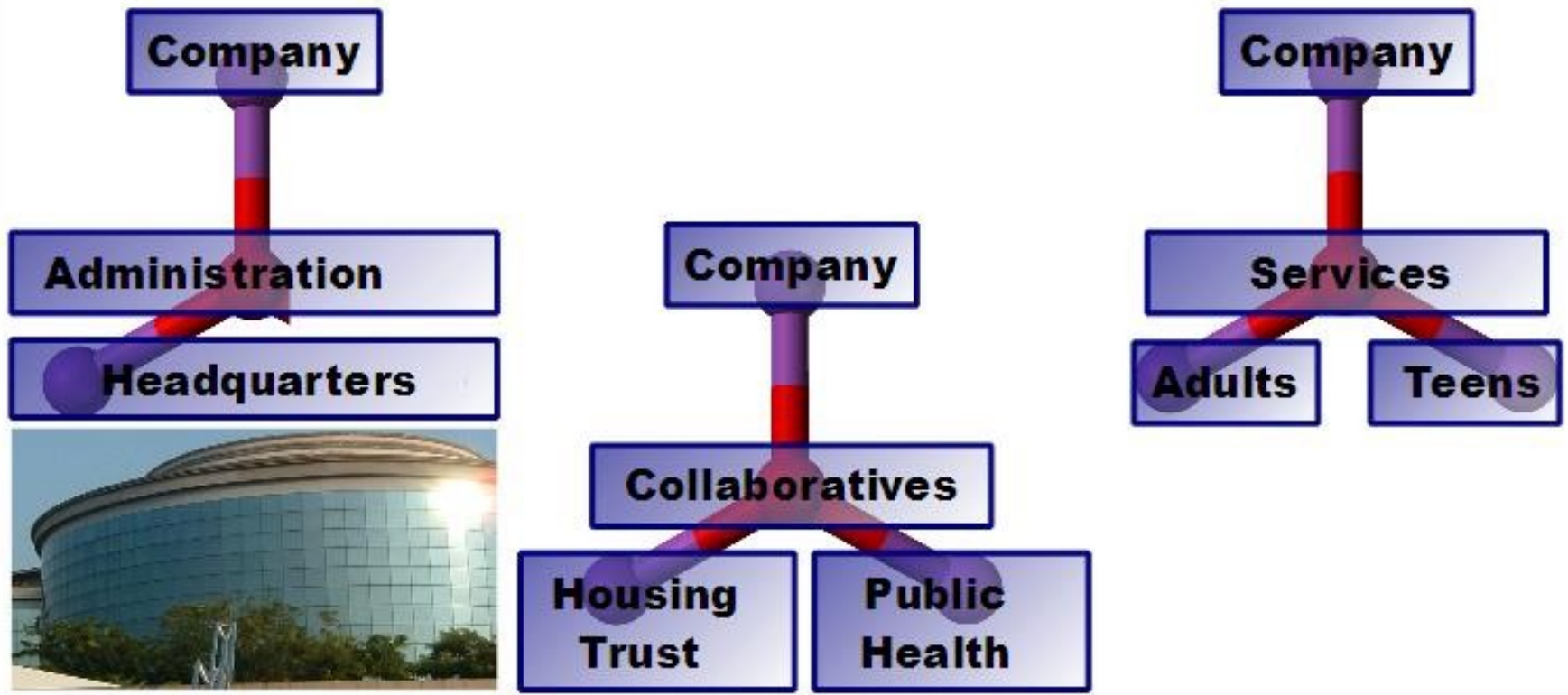
            Neg to Pos - (-1)=Action Needed | (0)=In Progress | (1)=Done

**Partnerships - Schools - Y4 02.01.02.01 Schl Prtnrs**

            Neg to Pos - (-1)=Action Needed | (0)=In Progress | (1)=Done

# WORK BREAKDOWN STRUCTURE

## \*\* Project Management \*\*



**Metrics are organized into functional groups.**

[http://upload.wikimedia.org/wikipedia/commons/0/09/UNITEN\\_Administration\\_Building.JPG](http://upload.wikimedia.org/wikipedia/commons/0/09/UNITEN_Administration_Building.JPG)

[http://upload.wikimedia.org/wikipedia/commons/2/21/Orleans\\_housing.JPG](http://upload.wikimedia.org/wikipedia/commons/2/21/Orleans_housing.JPG)

[http://upload.wikimedia.org/wikipedia/commons/0/0e/Vaccination\\_campaign.jpg](http://upload.wikimedia.org/wikipedia/commons/0/0e/Vaccination_campaign.jpg)

# Manage Projects and Programs



## Expected Results

COMMUNITY JOBS 92163 #005 E E

Assigned Staff Victor Bloomberg - COMMUNITY JOBS 92163

Sign In By Victor Bloomberg - COMMUNITY JOBS 92163

### Summary Plans

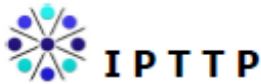
### Assessments

Title	Condition	Ingredient	Filter	Show All
Date	Assessment	Rating	Goal	Plan Description
4/7/2008	C B J T P Good Jobs For Everyone *01 Job Increase Income Neg To Pos	1	0	??
Narrative: Increased income maintained				
3/8/2008	C B J T P Good Jobs For Everyone *02 Safe & Stable Job Neg To Pos	0	1	Establish Conduct That Leads To Goal Achievement
Narrative: At-will employment, need to plan progress				
2/8/2008	C B J T P Good Jobs For Everyone *01 Job Increase Income Neg To Pos	1	1	Job Stability
Narrative: 1/8/				

**The user interface arranges the assessment and plan into easy-to-see, understandable priorities.**

# Collect and Relate Program Data

## Case Notes



P.O. Box 3483 San Diego CA 92163

4/18/2010  
Page 1 of 1

---

### Supervision Note

Staff Victor Bloomberg I P T T P Community Jobs 92163

Registered Record #001 A A

Date Range 1/8/2008 to 3/8/2008

Date 3/17/2010

Plan for Assessment C B J T P Good Jobs for Everyone \*02 safe & stable job Rating 0

Plan Started 3/8/2008 Ended Goal 1

Description Establish conduct that leads to goal achievement

Individual's Task Client stable for employer -> creates attractive track record

Task for Staff Connect client -> skills upgrade class

Date: 3/8/2008

Activity Coaching - Problem-Solving

Narrative Client expressed positive ambition to get a job that provides a livable wage. Oriented client to "long march" view.

Signature Victor Bloomberg Community Jobs 92163

**Entries (for services or project milestones) are collated for quality control/assurance.**

Supervision Comment

Extend asset mapping, integrate community and personal maps

Supervisor Signature Oliver Hardy Administration 92101

# Collect and Relate Program Data



Standard Screening Form - Side 1  
Ages 18+

## Alcohol Use Disorder Involvement Test (AUDIT)



Ask about last 12 months These first questions ask about alcoholic beverages, which can include beer, wine, wine coolers, vodka, tequila, etc.

1. How often do you have a drink containing alcohol? If Never (probe): a) definition of alcoholic beverages; and b) drinking on holidays.

- 0 Never       1 <1x/mo-1x/mo       2 2x/mo-1x/wk       3 2x/wk-3x/wk       4 4x/wk-7x/wk

2. How many drinks containing alcohol do you have on a typical day when you are drinking? Probe: a) what kind of alcohol? b) what

- 0 1-2       1       2 5-6       3 7-9       4 10+




3. In the past 30 days, how often have you had more than M-4/F-3/65+-2 drinks on any one occasion? Probe: special occasions/holidays?

- 0 Never       1 <1x/mo       2 1-3       3 4-5       4 6+

Subtotal

**A widely understood, low-tech option for data input responds to resource deficits known as “digital divide”. Info Power To The People® provides the import service.**

**Optical Marks Recognition**  
Answer sheet designed with FormReturn(tm)

 Back
  Forward
 
**Reports**
 Number of Records Selected: 12
 Keyboard [Enter] or Click "White Space" to Commit

**1. Record Basis**    **2. Demographics**    **3. Outcomes**    **4. Surveys**    **5. Community Relevance**

Organization: 
   All Section Types: 
   All Sections: 
   All Staff:

Reporting Year	IPTTP		Report Period	
	Begin Date	End Date	Year	Quarter/Month
Jul - Jun	1/1/2004		Start: 2008	January
Q1 Jul - Sep			End: 2008	June
Q2 Oct - Dec	Begin First Full Year	Begin Last Full Year	2008 Third Quarter (January) -- 2008 Fourth Quarter (June)	
Q3 Jan - Mar	7/1/2004			
Q4 Apr - Jun				

The pool of Registered Records is constrained or expanded by the timeframe instructions. Choose records based upon when they were Begun, Closed and/or Completed.

Begun		Closed		Completed	
Year	Quarter/Month	Year	Quarter/Month	Year	Quarter/Month

**Design and retain report queries that are essential for a compliance report and for an exploratory analysis (used by program planning & evaluation).**

**Set sophisticated parameters for the time frame.  
Focus the reports on a cost-center, clusters or all of them.**





Return

**Methods Report (number of records = 12)**

Export

Print

**IPTTP - All Section Types - All Sections**

Record Basis: **Begun - 2008 Third Quarter (January) -- 2008 Fourth Quarter**

Reporting Period: **2008 Third Quarter (January) -- 2008 Fourth Quarter (June)**

**4/1/2008**

Assessment: **Has difficulty paying bills**

Rating: **1**

**4/11/2008**

Assessment: **Is behind in his rent**

Rating: **1**

**5/4/2008**

Assessment: **Has troubles from not enough money**

**Statistics show the distribution of results for a population. The low- and high-end results are significant for program planning and evaluation. Comparisons, over time, produce insights.**

**Save record pools as well as the instructions for future analysis. Export report results to a spreadsheet.**

# Statistics

Productivity Report for All Sections

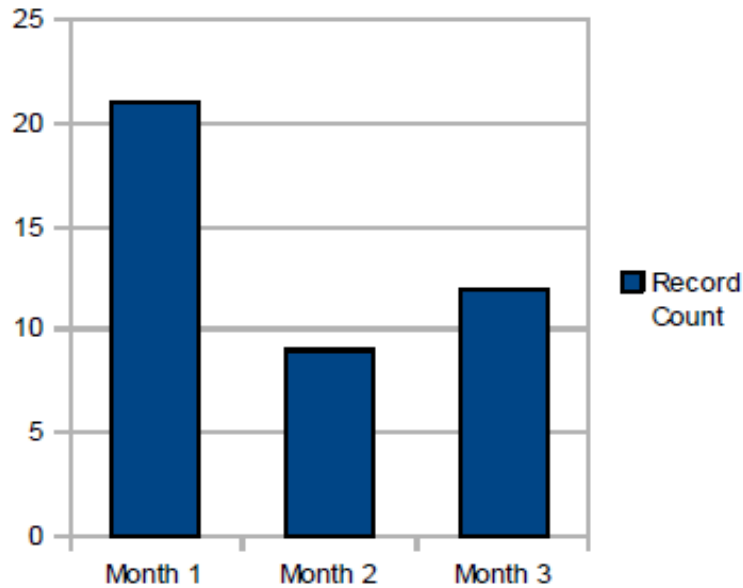
Record Basis: Begun - 2008 Third Quarter (January) -- 2008 Third Quarter (March)

Reporting Period: 2008 Third Quarter (January) -- 2008 Third Quarter (March)

Report Date: 4/17/2010

Number of Registered Records	Month
Min	9
Max	21
Avg	14
S.D.	5.099

	Record Count	Totals		
Month 1	21	Quarter	42	50%
Month 2	9	Semi-Annual	42	21%
Month 3	12	Year	42	29%





P.O. Box 3483 San Diego CA 92163

# Statistics

4/17/2010 Page 1/1

---

## Demographic Report (number of records = 30)

---

Date Begun: 2008 Third Quarter (January) -- 2008 Third Quarter (March)  
All Sections

Record Basis: Begun - 2008 Third Quarter (January) -- 2008 Third Quarter

Reporting Period: 2008 Third Quarter (January) -- 2008 Third Quarter (March)

Greater than 100% = Venn Diagram Occurrence

Filters: Sex (f)

---

### Individuals (N = 30)

---

#### Sex:

Item	Count	Percentage
Female	30	100%

#### Ethnicity:

Item	Count	Percentage
Hispanic-American	10	33%
European-American	12	40%
African-American	8	27%

#### Language:

Item	Count	Percentage
Spanish-English Bilingual	10	33%
English - Monolingual	20	67%

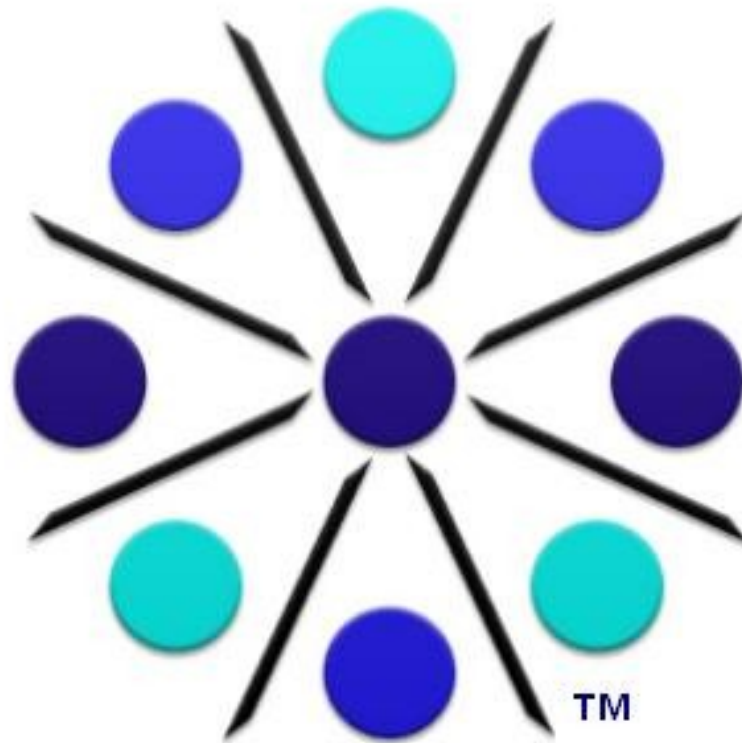
## Summary

*Info Into Power* adds capacity for the analysis of an RFP and the writing of a grant proposal that keys into deliverables.

When awarded the contract, *Info Into Power* converts the metrics derived from the RFP into a program management system.

The case notes and statistics are integrated for compliance and outcomes reports, as well as quality assurance.

Data analysis tools assist each organization and the collaborative to innovate through insight into patterns and trends that are not visible without *Info Into Power*.



**INFO POWER TO THE PEOPLE<sup>®</sup>**

**[www.ipttp.com](http://www.ipttp.com)**