Connecting the Information Dots

A Webinar Series for International

Not-For-Profit Organizations
# Webinar Series

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Topic</th>
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<tr>
<td>Tues, Aug 13&lt;sup&gt;th&lt;/sup&gt; @ 11:30AM - 12:45PM EDT</td>
<td>Project Management using PMD Pro 1, SmartSheet</td>
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<tr>
<td>Tues, Aug 27&lt;sup&gt;th&lt;/sup&gt; @ 11:30AM - 12:45PM EDT</td>
<td>An Integrated Approach to Award and SubAward Management</td>
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<tr>
<td>Tues, Sep 10&lt;sup&gt;th&lt;/sup&gt; @ 11:30AM - 12:45PM EDT</td>
<td>iHRIS: Health Worker Information Systems Strengthening</td>
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<td>Tues, Sep 24&lt;sup&gt;th&lt;/sup&gt; @ 11:30AM - 12:45PM EDT</td>
<td>TaroWorks: Mobile Tools to Manage Your Customers &amp; Field Operations</td>
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Questions

- Type your questions in the QUESTIONS box of the control panel. We’ll ask the presenters to respond to timely questions during their presentation. We’ll address the rest of the questions at the end of webinar.

- By default, your microphone is muted. Because we have so many attendees, we’ll keep everyone muted throughout the webinar.
Webinar Recording

• We’ll be recording the webinars in our series
• We’ll make these recordings available to those who attended the webinars first, and eventually to the general public
Today’s Webinar

Project Management using PMD Pro 1, SmartSheet

Maureen MacCarthy
Partner, Mission Critical Development
PMD Pro 1 Instructor, InsideNGO

Scott Mills
Vice President, Global Information Technology
Conservation International

Moderators: Bill Lester, Executive Director at NPOKI
Igal Rabinovich, CEO at n-Village
Let’s Take a Quick Poll!

• We want to learn about your organization
• We want to learn about project management at your organization
Mission Critical Development


and

InsideNGO

Operational Excellence for Global Impact

Project Management Suite of Services:
A collaborative offering promoting Project Management Excellence for InsideNGO member organizations
Inside NGO’s PMD PRO 1

- PMD Pro 1 is a three day training curriculum that confers professional certification appropriate to professionals working in the NGO sector.

- The course is assessed by a one hour, closed book, multiple choice exam. The exam tests participants’ knowledge and comprehension and confers a PMD Pro 1 certification on those passing the written exam.

- The credential is a globally-recognized certification for project managers.
Inside NGO’s PMD PRO I

PMD Pro I, key learning elements:

- Project management across the full lifecycle of the project,
- Practice the sequence of steps necessary for successful project management,
- Understand key project roles & responsibilities and the importance of planning and collaboration in PM,
- Gain practical experience using project management tools, templates, and methodologies.
Efficiency and Effectiveness of PMD training

PMD popularly spread word of mouth colleague to colleague - individuals pursue PMD training

Full team and leadership trained in custom in-house trainings

Org plan for implementation

Ability to change organizational practices
A Case Study: Implementing PMD
American Red Cross International Services
ARC Project Management

- PM support spans, HQ, Field office, and the National Society implementer in country.
- Many have been trained in PM but by various trainings.
- Difficult to adhere to one unified system for all projects.
- Confusion when comparing projects because of different systems/designs.
- Inconsistent practices in the use of PM Charter, RACI, Issues logs, WBS, etc.
Advantages of PMD Pro Training and Implementation for ARC

- Clean up processes support project management elements and therefore consistency
- Aid in development of “One” Project management system
- Inform the development system requirements for the design of the project management and reporting database
ARC Phased Approach

- Initially, two staff were trained through InsideNGO
- Secured Sr Mgmt. support and funding to allow
  - In-house trainings held for HQ staff and in the field
- Implementation and performance support from Mission Critical Development
- Development of SOPs and department wide tools for project management
- Roll-out of customized, web-based PM platform
Full Project Management Integration

Services to support Goals

1. Organizational Assessment of PM practices and Need Identification
2. Customized, In-House PMD Pro Training
3. Facilitation of Post-training Implementation strategy
4. Options for follow-up implementation assistance

Assess current state of Project, Program and Portfolio Management practices

All staff trained in PMD

Strategy to align & change PM & KM practices

Integrated PM practices
Current State of PMD and ARC

- Over 350 HQ, Field, and Partners trained in PMD Pro I
  - New trainings are planned for more countries where ARC has programs
  - Continue to require all new staff to attend the course

- System requirements completed for pilot phase of ECOS
  - Central project management system

- Preparing for PMD Pro II and Train the Trainers course
One System - Organizational Learning throughout the process

**Before** - Knowledge about Projects

**Design**

**Project Marketing**

**Planning & Control**

**Metrics & Control**

**Methods & Templates**

**During** - Knowledge in Projects

- **PM Plan**
- **Documentation**
- **Discussions**
- **Meeting Repository**

**After** - Knowledge from Projects

**Lessons Learned**

**Best Practices**
Results

- Shared understanding of PM between HQ-Field-Partners and universal language for PM
- PMD Pro tools were used to better articulate roles and responsibilities of ARC and its partners
- Increased PM capacity of ARC and partners
- Better dialogue/coordination between operations and finance
- Provided framing for process mapping of project management across organization, partners and key stakeholders
# Value Proposition for NGO’s

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<th>Value</th>
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| NGO’s       | • Better Project and Program Quality  
• Project and operational efficiency and improved outcomes  
• Better reporting on programmatic impact and organizational strategy  
• Protect mission strategy and organizational knowledge from risks associated with key staff and stakeholder turnover.  
• Increased return on investment |
Project Mgmt – Keeping it Simple & Cloud Enabling It

Scott Mills
Project Mgmt – Tips &…..

*Lessons learned from implementing a Project Management methodology in a global organization.*

Make the business case – what’s in it for the users, projects, programs?

Keep it simple – use the best practices built into the methodology that really matter; don’t try to do too much

Training – get everyone a foundation in the PM methodology you are using. Train the trainer works well.
.....*Tools (Smartsheet)*

Smartsheet – Excel with superpowers….in the cloud.

**Deployment –**
Can be deployed in minutes – allows IT to focus on user adoption, not building servers or software integration
Integration with Google Apps & single sign-on (but doesn’t require it)

**Simple -**
Much shorter learning curve than MS Project
Easy to use templates and familiar interface
Not bureaucratic for the staff to use

**Collaborative -**
Sharing and email integration built in…. Actually fun to use
Easy to adapt to other uses – task mgmt, contract mgmt, etc.
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