

EFFECTIVE PROJECT LEADERSHIP PERSPECTIVES ON MANAGING GRANTS AND RESEARCH TEAMS

Roundtable at SSWR 28th Annual Conference

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FIVE PHASES OF PROJECT MANAGEMENT



Source: PMBOK Guide (Project Management Body of Knowledge) by the Project Management Institute (PMI)
<https://kissflow.com/project/five-phases-of-project-management/>

DO YOU CURRENTLY HAVE A PROJECT?

PHASE	DESCRIPTION	PARTICIPANT REFLECTION
Initiation	Broadly define the project.	I have a project/research idea but am just getting started.
Planning	Organize their teams, set up collaborative resources, and set goals.	I'm working to identify the project scope and objectives.
Execution	Develop and complete deliverables.	My project is currently active.
Monitoring	Work to ensure that project results align with the management plan.	My project is currently active, and I am reviewing the data, budget, and activities to see if anything needs to be revised.
Closure	Create a list of things that didn't get accomplished during the project and work with team members to complete them, and perform a final project budget, and prepare a final project report.	My project is no longer active, and I'm working with the sponsor to close the project.

PRESENTER INFORMATION

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STEP 1

PROJECT INITIATION

Create a Project Plan
(aka Project Charter)

Vision, objectives,
scope, and
deliverables
(i.e. what we have to
achieve)

Stakeholders, roles,
and responsibilities
(i.e. who will take
part in it)

Resource, financial,
and quality plans
(i.e. how it will be
undertaken)

STEP 2

PROJECT PLANNING

- Detailing the activities that make up your project - define scope
- Setting major milestones
- Establishing a schedule and/or timeline - how to measure ongoing progress
- Identifying the resources you need for the project: staff, equipment, facilities, participant incentives



STEP 3

PROJECT EXECUTION

Implementing your project protocol

Tracking Progress & Process

- Check-in meetings
- Retrospective/Planning meetings
- Reports
- Resource allocation and management
- Staff
- Financial reconciliation



STEP 4

PROJECT MONITORING

- Compare time, cost, and performance of the project
- Make necessary adjustments to the project activities, resources, and plan
- Revise and implement changes
- Reevaluate and discuss with the PI and research team
- Think about sustainability and next steps for your project and team



STEP 5

PROJECT CLOSURE

Finish all tasks

- Progress reports, regulatory reports/closures
- Publish paper(s)
- Write new grant or start your new grant if you have one already



Get final approval

from the project
sponsor and other key
project stakeholders



Plan for data storage

RESOURCES: PROGRAM MANAGEMENT

PMP certification - Project Management Institute

www.pmi.org

Online PMP® Prep & Project Management Courses

www.umgc.edu/business-management/certwise-project-management.html

KICKOFF™ - free, interactive PM course and digital toolkit

www.pmi.org/kickoff

A Guide to the Project Management Body of Knowledge (PMBOK® Guide)

www.pmi.org/pmbok-guide-standards/foundational/pmbok

PMI's Virtual Experience Series - free webinars

www.pmi.org/virtual-experience-series