

Managing A Successful Project

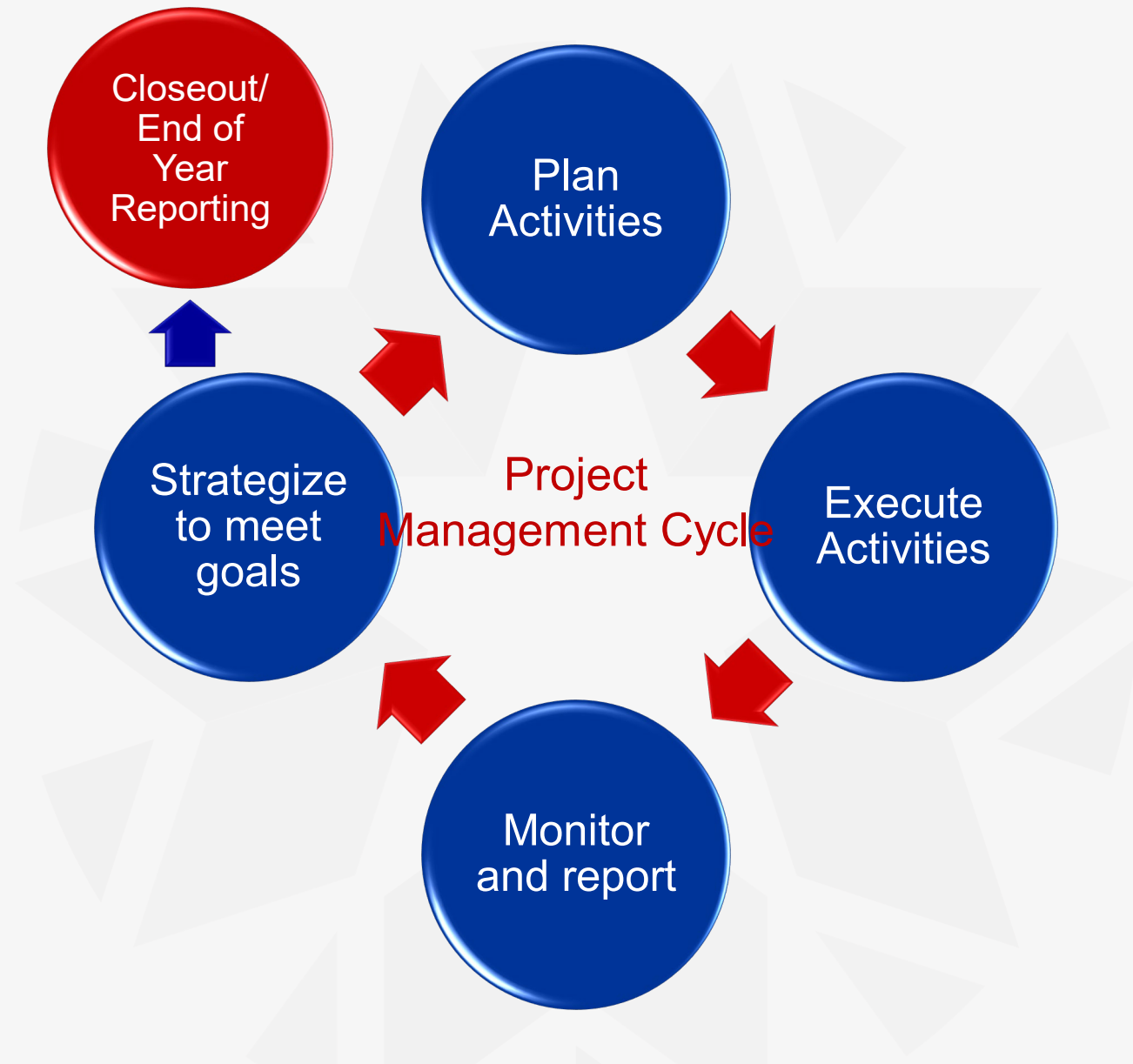
ROLES, GOALS AND REPORTING

Nicole Phillips & Angie Spencer

Program Managers

Objectives

- Understand the Project Directors' and Finance Officers' Role
- Understand the Program Managers' Role
- Identify resources to strategically plan project implementation
- Build value-added Progress Reports
- Learn to use project performance information to drive success



PLAN ACTIVITIES



Project Director/Financial Admin

- Project Implementation
- Prepare for next reporting period
- Project staff/volunteer management

OHSO Program Manager

- Strategic support

Planning Activities



- Planning criteria
 - Grant agreement
 - Project goal & activity milestones
 - Countermeasures
 - Budget projections
- Managing project staff
 - Project activities
 - Shift Planning
 - Training
- Public Information & Education – www.trafficsafetymarketing.gov



EXECUTE ACTIVITIES

Project Director/Financial Admin	OHSO Program Manager
<ul style="list-style-type: none"> • Activity oversight • Timesheets/Activity Report collection and review • Timesheet submission for Payroll • Gather supporting documentation 	

EXECUTE ACTIVITIES

Execute
Activities

Manage the details so your project is successful. Engage in continuous planning, monitoring and adjusting as needed

- Manage your Budget
- Keep project goal(s) and milestones in mind.
 - Work adequate hours projected or above
 - Conduct the number of classes or activities projected
- Use evidence-based strategy and best practices

Supporting Documentation

- Activity Sheets (enforcement grants) or Timesheets
 - Days & hours worked
 - Written contacts (warnings/citation)
 - Make sure you have Signatures (Individual and Supervisor)
- Enrollment lists, curricula, agenda, receipts
- Class Rosters, evaluations, sign-up sheets



MONITOR & REPORT

Project Director/Financial Admin

- Progress Report (PR)
- Reimbursement Requests (RFR/RFP)
- Ongoing project monitoring
- Other award-specific reporting requirements
- Continuous monitoring

OHSO Program Manager

- Process reports and claims
- Strategic support
- Technical assistance
- Verify internal controls
- Periodic monitoring of milestones and finances.

REPORTING REQUIREMENTS

Monitor and
report

Regular Reporting requirements


- Monthly Progress Report (PR) and Requests for Reimbursement (RFR)
 - Required, even if no activity performed.
 - Reimbursements for funds paid
 - Timely submission supports effective management
 - Due 30 days after the activity within the report has occurred
 - Late reports prevent strategic response
- Contractual reporting requirements
 - Award-specific
- Monitoring Report
 - Required reviews by your OHSO Program Manager

Knowledge Check

Who is primarily responsible for ensuring an activity or purchase is allowable?

- Program Manager
- Project Director
- OHSO Finance Manager
- Officers or staff working the shifts

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-  Project Director
- OHSO Finance Manager
- Officers or staff working the shifts

As a project director, you should review your grant agreement for what activities and expenditures are allowable and communicate that to your staff. Program managers will verify, finalize requests for reimbursement and can provide additional support as needed.

Progress Reports



Progress Reports


- A summary of monthly activity
- Milestone progress reporting (based on monthly targets).
- Written contacts summary for enforcement grants
- Classes or Activities conducted
- Narrative Summary

Knowledge Check

In what time frame must monthly reports be submitted?

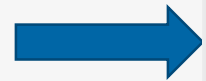
- When project staff gets around to it
- 45 days after the end of the month
- At the end of the fiscal year
- 30 days after the activity within the report has occurred

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- 45 days after the end of the month
- At the end of the fiscal year
-  30 days after the activity within the report has occurred

All reports are due *monthly*. Without timely reporting, program managers are unable to do their part of the project management cycle to help ensure the success of the project. Continued late reporting can and will affect your ability to obtain future OHSO grants.

Section 1: Progress Report Information



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Check here if you have no activity to report this reporting period

Project Title:

Monthly Report for: June 2020

Report #:

Contract Period: Start Date: Oct 1, 2019
End Date: Sep 30, 2020

Project Director:



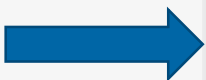
Reporting Period: Start Date: 6/1/2020*

Program Manager:

End Date: 6/30/2020*

During this reporting period, the following activity was conducted:

Activity	Project #	Projection	Actual
1 Hours of overtime traffic enforcement/PI&E (based on OT rate of: \$/hour).	PT-20-03-11-10	30.00	66.00
2 Number of traffic stops (target is 2 per hour).	PT-20-03-11-10	60.00	122.00
3 Number of PI&E activities conducted - minimum 2 per month (to include media contacts, traffic safety presentations, etc.).	PT-20-03-11-10	2.00	2.00

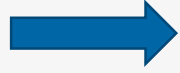




If the project includes enforcement activity, complete the following section for **grant funded** activity:

Number of written contacts

Speed Related	DUI/DWI/APC	Occupant Protection	All others	Total
70	0	1	121	192

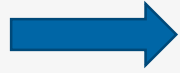


Narrative Summary

722 of 2000 *



Full name



I, , of lawful age, being first duly sworn, on oath, say that I am, or authorized to submit this report on behalf of, the duly authorized Project Director of the above mentioned grant agreement with the Oklahoma Highway Safety Office; do depose and say that I have full knowledge of this "Project Director's Progress Report;" that said report is, in accordance with the aforementioned grant agreement, true and correct. Affiant further states that he/she has fully complied with all Municipal, State and Federal Laws, Regulations and directives governing grants including, but not limited to, those listed in Parts II and III of the aforementioned grant agreement, to the best of his/her knowledge, information and belief.



Program Manager Comments

Progress Reports

- Good Narrative Summaries
 - Highlight significant information and successes
 - Explain anomalies

“...XX county experienced widespread flooding, preventing OT enforcement for part of the month.”

- Share non-grant highway safety information

“In addition to 6 DUI arrests by officers working the grant, **there were 15 individuals arrested for the month by the Patrol Division.**”

Progress Reports

- Good Narrative Summaries, continued
 - Share progress not reported in milestones (e.g. pre-planning/contingency)

“Training sessions have been scheduled with XX on the following dates...Once the last two courses are finalized, I’ll communicate the full schedule.”

“Three of our scheduled events were cancelled. Included with this month’s attachments is our contingency plan which takes into consideration CDC guidelines impacting how we can move forward.”

- Inform of changes
 - Contractual payroll, new project staff

Knowledge Check

What types of information should go in your narrative summary?

- Significant information and successes
- Written summary of contacts
- Explanation of anomalies
- Personal Identifying Information (PII)

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Note:

- Contact numbers are captured in section 1 and do not have to be revisited in the narrative summary.
- Personal Identifying Information (PII) should not be included in reports.



STRATEGIZE

Project Director/Financial Admin	OHSO Program Manager
<ul style="list-style-type: none"> • Change requests • Communicate with Program Manager • Strategize based on data • Strategize based on performance 	<ul style="list-style-type: none"> • Change request support • Monitor progress alignment to goal(s) • Strategic support • Recommendations



Section 2: Summary of Activity

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Activity

#	Description	Project #	Monthly Projection	Actual Mo Result	Year to Date Projection	Actual YTD Result
1	Hours of overtime traffic enforcement/PI&E (based on OT rate of \$ /hour).	PT-20-03-11-10	30.00	66.00	270.00	348.75
2	Number of traffic stops (target is 2 per hour).	PT-20-03-11-10	60.00	122.00	540.00	641.00
3	Number of PI&E activities conducted - minimum 2 per month (to include media contacts, traffic safety presentations, etc.).	PT-20-03-11-10	2.00	2.00	18.00	17.00
4	Project Director or designee to attend OHSO Project Director's Training Course.	PT-20-03-11-10			1.00	1.00
5	Submit narrative report on the 2019 Lifesavers Conference with at least two recommendations for improving traffic safety efforts in Oklahoma.	PT-20-03-11-10			1.00	0

Knowledge Check

You observe reduced DUI activity on OT shifts, but increased activity on non-grant department activity. What should you do?

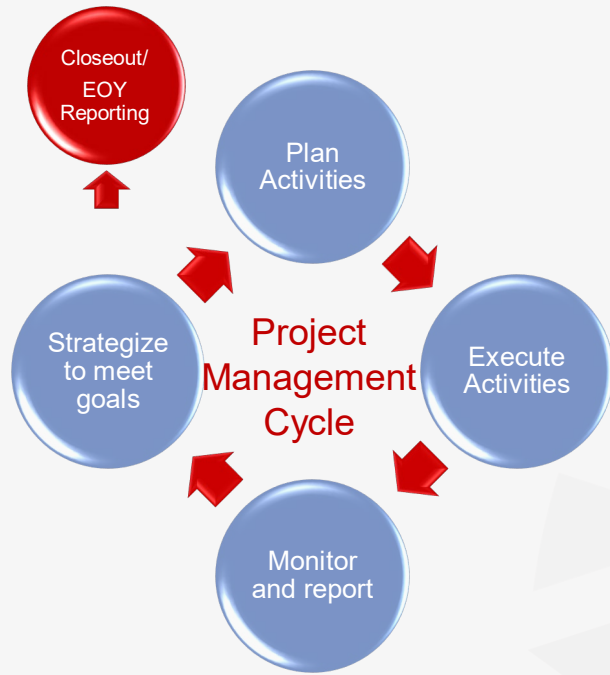
- Review local and state data with your PM and consider different shift times.
- Nothing. We'll get them eventually.
- Delay submitting progress reports until the numbers look better.
- Claim the non-grant activity and include it on your report for reimbursement

You observe reduced DUI activity on OT shifts, but increased activity on non-grant department activity. What should you do?

- Review local and state data with your PM and consider different shift times.
- Nothing. We'll get them eventually.
- Delay submitting progress reports until the numbers look better.
- Claim the non-grant activity and include it on your report for reimbursement

Always take action to reach your project goal. Timely reporting is important, so avoid delay. Claiming non-grant activity for reimbursement is fraudulent!

CLOSEOUT



Project Director/Financial Admin

- Project Assessment
- Submit End of Year summary

OHSO Program Manager

- Submit End of Year summary comments

• End of Year Summary

- Due no later than October 31 & includes info tying project activities to goals & accomplishments.
- If reporting is timely and accurate, closeout becomes very straightforward!

Keys To Success?

- *COMMUNICATION*
 - With project staff
 - With your financial coordinator
 - With your program manager
- *Plan strategically*
- *Use data*

Knowledge Check

Which is not a responsibility of the Project Director/Finance Officer?

- Project implementation
- Gathering supporting documentation
- Submit Progress Reports (PR) and Reimbursement Requests (RFR)
- Periodic monitoring

Which is not a responsibility of the Project Director/Financial Admin?

- Project implementation
- Gathering supporting documentation
- Submit Progress Reports (PR) and Reimbursement Requests (RFR)

 Periodic monitoring

Periodic reporting here refers to the program manager's on-site, desk, or virtual monitoring visits. In contrast, project directors and financial admin should engage in ongoing/continuous project monitoring

At what stage in the cycle should you communicate with your financial officer/coordinator?

- Plan activities
- Execute activities
- Monitor and report
- All the above

At what stage in the cycle should you communicate with your financial officer/coordinator?

- Plan activities
- Execute activities
- Monitor and report
- All the above



Communication throughout every stage of project management is critical. Whether your financial admin is in HR, payroll, or administration, stay in constant communication!

If you have questions, please
contact your assigned Program
Manager

Let's take a break

Please return at 11:00 a.m. for the next session

Up next:

Best Practices for Project Directors

Jaclynn Todd