

Project Management Principles and Practice (PUBH 747)

Welcome!

Welcome to PUBH 747 Project Management Principles and Practices. This course presents an overview of leadership and management principles and practices with an emphasis on project management; it focuses on management and leadership skills that are applicable to team based organizations and to public health projects and programs. The lifecycle of a project, including planning and leadership of a project's team and daily activities are presented in this course with a focus on ways to achieve maximum efficiency by means of the application of continuous quality improvement techniques to team / project processes. The course builds on organizational and general management and leadership principles which are applicable to health and medical care, and which promote efficient project management.

Lead Instructor and Primary Contact

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Co-Instructor

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Objectives

The course will be divided into four modules: Management Principles, Organizational Principles, Total Quality Management/Continuous Quality Improvement and Project Management. The learning objectives for each module are as follows:

Management Principles

- To describe the role of managers in a high-tech, team-based service environment with specific application to medical and public health organizations. Students will be able to understand the management issues and challenges of such organizations.
- To describe management techniques that are specifically applicable to team-based organizations. Students will understand how to apply management techniques related to concepts of managerial leverage, decision-making and planning.

Organizational Principles

- To describe a range of types of organizational models with emphasis on those that are most suitable for team/project based organizations. Students will be able to compare these structures to their own organizational backgrounds and will be able to understand organizational principles that support project management.

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- To describe the principles, advantages and disadvantages of a matrix organizational structure as a basis for managing interdisciplinary teams. We will present specific examples of matrix structures in health care.
- To describe the concepts associated with the Virtual Organization Model which is being widely applied in many industries. To give students an understanding of how these concepts relate to their specific areas of public health.

Continuous Quality Improvement

- To have a thorough understanding of the meaning of the 14 Deming Principles and how they apply in a service setting, such as the management of medical and public health programs.
- To introduce the general concepts and procedures of Continuous Quality Improvement with applications to team-based public health settings, and the management of project teams. Students will be introduced to examples of tools used to apply CQI principles in their organizations.

Project Management

- To apply the principles of management, organization structures and continuous quality improvement to the efficient management of projects in the Quality Project Management system.
- To describe the project life cycle, from identification of project opportunities through completion of a project. Students will learn the process of developing time lines and budgets along with procedures for monitoring progress on projects.
- To learn the principles of communication, team building, and team motivation, including the characteristics of project managers and teams which lead to success. Students will learn processes for organizing, managing and empowering project teams. Detailed case studies of health and medical projects will be presented. Students will be able to evaluate the current level of project management in their own organizations and will also be able to manage complex technical projects in their own area of public health and medical care.
- To illustrate examples of hands-on project management tools and techniques, including project management software.

Methods

The course is composed of weekly reading assignments and Internet lectures. Work assignments, both individual and team assignments, will be submitted as specified in the course schedule. Guest lecturers will also be invited to present Internet lectures. These lecturers will present case studies of actual projects they have been involved with and reinforce key points from the lectures based on their firsthand experience.

Textbooks

Required Texts:

- **High Output Management**, Andrew S. Grove, Random House, 1995. ISBN: 9780679762881
- **Project Management for the 21st Century, 3rd Ed.**, Bennet P. Lientz and Kathryn P. Rea, Academic Press, 2002. ISBN: 9780124499836

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- **McLaughlin and Kaluzny's Continuous Quality Improvement in Health Care, 4th Ed.** William A. Sollecito and Julie K. Johnson, Jones and Bartlett Publishers, 2013. ISBN: 9780763781545
 - NOTE: This textbook is available in the UNC Libraries and required Chapters are available digitally on the Readings e-Reserves page.
 - ***It should also be noted that the Co-Instructor is the Lead Editor for this textbook, and an author of selected Chapters.***
 - ***IMPORTANT: Recommended Supplemental Reading Chapters from this book are not posted on the course e-Reserves.***
- **E-Reserves:** Management Principles and Practices, PUBH 747 Readings. Available online in Sakai.

Supplemental (Optional) Texts:

- Continuous Quality Improvement in Health Care: Theory, Implementations and Applications, Third Edition, Curtis P. McLaughlin and Arnold D. Kaluzny, Jones and Bartlett Publishers, 2006. ISBN: 0763727121
- Total Quality Management - The Health Care Pioneers, Maria Minerva Melum and Marie Kuchuris Sinioris, American Hospital Publishing, Inc., 1992. ISBN: 9781556480898
- First Break All the Rules: What the World's Greatest Managers Do Differently, Marcus Buckingham and Curt Coffman, Simon & Schuster, 1999. ISBN: 9780684852867
- Health Care Management - Organizational Design and Behavior, 5th Ed. Stephen M. Shortell and Arnold D. Kaluzny, Delmar Publishers, Inc., 1999. ISBN: 9781418001896
- A Guide to the Project Management Body of Knowledge, (PMBOK), 4th Edition. Project Management Institute, 2008. ISBN: 9781933890517
- The Five Dysfunctions of a Team: A Leadership Fable, Patrick M. Lencioni, Jossey-Bass, 2002. ISBN: 9780787960759

Grading

Your final grade will be based on a combination of individual assignments, team assignments, and participation. In addition to the grades assigned by the faculty, each individual will also be evaluated by their peers on their performance and participation in the team assignments. The six graded aspects of your work and their relative weight in computing your course grade are as follows.

Individual grade components:

- Production model assignment (5%)
- Midterm (30%)
- Participation & Punctuality (5%)
- Peer Evaluations (5%)

Team grade components:

- Team assignments for Modules 1-3 (20%)

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- Final Project (35%)

Grading Scale:

- H Clear Excellence
- P Entirely Satisfactory
- L Low Passing
- F Failed
- IN Incomplete

Explanation: A grade of H can be earned only by exceeding all expectations in the assignment. An H - on an assignment would mean that you exceeded all expectations but you had some minor errors (but none that kept you from providing accurate answers to every request in the assignment). A P is "Perfectly Acceptable." This means that you met the expectations of the assignment. More than minor omissions or factual errors would result in a grade lower than a P.

Grading Notes:

- All members of a team will receive the same base grade (and if required, adjusted down based on participation and punctuality on team assignments).
- Each team member will also receive an individual grade on each of the four modules based on his/her performance as a team member.

Schedule

See the **Course Schedule** for the weekly assigned online lectures, readings and assignments.

Preparing your Team Assignment (Steps to follow for PUBH 747)

Since the objectives of this course involve your active learning to reinforce key elements of: Management Principles; Organizational Principles; Continuous Quality Improvement; and Project Management, both individual and team assignments are required.

For the Team Assignment in Modules 1, 2, 3 and for the Final Project (Module 4), incorporate the following activities into your team's work flow.

As a Team and at the beginning of each module (if not accomplished via the course "social hour" and introductions):

1. Assign a Facilitator for the Module
2. Develop an Action Plan to respond to the team assignment.
 - o Clarify Team Member Roles for the team assignment – common ones are:
 - Facilitator (project manager)
 - Scheduler
 - Editor, proofreader
 - Secretary, note taker
 - Multimedia developer (e.g., PowerPoint, Excel)
 - o Refer to the Assignments page and the Schedule page to determine the assignment details

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o Develop a work schedule for your team and divide the work among team members to take advantage of individual strengths. Be certain to post the work schedule on your Team Forum in Sakai so that the instructor is able to monitor participation and punctuality.

3. Please note that **all sections of each assignment must be FIRST completed individually by each student (as evidenced by the posting of individual answers/responses to each of the assignment questions to the Team Forum in Sakai)** before being incorporated into the team submission.

4. Five percent of each student's grade will reflect:

1. Individual completion of the assignment (see details below)
2. Adherence to the due dates established by the team for each assignment.

5. Students are not to work with students outside of their assigned Team for this course.

However, if any individual or Team wishes to initiate contact with other class members, please contact the lead course instructor to discuss your need so that we can determine an appropriate approach together.

NOTE: Individual efforts and workloads within teams may be unequal from one Team Assignment to the next. **It is the responsibility of each team to devise an equitable work plan. Please keep the Lead Course Instructor informed of important considerations as well as your team members.**

For each Module:

1. **Complete each module assignment individually.**

2. Review, compare and discuss individually posted answers to each part of the module homework assignment.

3. Collaborate with your teammates to develop the best team answer to the assignment questions, by using the following suggested process:

a) **Exchange a copy of your work on the assignment with each of your teammates. To do this, post your work to your Team Forum on Sakai.**

b) Review team members' individual work and discuss the assignment. To do this, you can use your team discussion forum to work at a distance or if team members agree and all can participate, you can work via Skype or via teleconference or even in person, as the situation permits. **Note: Using the Team Discussion Forum on Sakai is the default method for discussion (even for residential students).** In the rare event your team is composed of all residential students, you can only undertake in-person meetings if all team members agree and are available to attend.

c) Select the best answer to the assignment from among team members' individual work. Depending on the assignment, a single team member's work may best answer the assignment problem, while other times an enhanced version of one member's answer or a consolidated version of several members' work may best answer the assignment problem. When multiple organizations are being used in an assignment, be sure to clearly identify them.

4. Team Assignments being submitted to the Instructor are to be posted to the Team Forum in the associate section in Sakai. See the course schedule for due dates. **NOTE: Only one team member is to post the final work product.**

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NOTE: Individual Assignments (i.e., Production Models and Midterm) are to be posted to individual's personal Dropbox in Sakai.

Peer Evaluation

At the end of each of the four modules, you will be required to complete and submit electronically a peer evaluation for each of your team members (see Schedule for dates to submit the peer evaluations). The purpose of the peer evaluation is to evaluate each of your team members on her/his performance as a team member in completing team assignments. The electronic peer evaluation is completed four times--once after each module.

In the peer evaluation, you will be asked to rate individual team members on each of the following five statements:

1. This team member actively participated in team assignments;
2. This team member accomplished tasks on time;
3. This team member's work reflected an acceptable level of thought and effort;
4. This team member functioned as a valuable member of the team by supporting the efforts of fellow team members;
5. This team member would make an excellent project manager for this team.

You will evaluate team members using the following 5-point Likert scale. **DO NOT rate yourself**, select the last option is "I am this student". When completing the peer evaluation, please check the final box for each question that refers to you specifically by name.

Strongly Agree	= 5
Agree	= 4
Neither Agree nor Disagree	= 3
Disagree	= 2
Strongly Disagree	= 1
I am this student	= n/a

In addition to the five statements, the peer evaluation has an open-ended question in which you can write specific comments on the performance of each of your team members. You will receive an overview of the feedback provided by your team members after the evaluations have been submitted and tallied in the form of "Good work", "Okay", or "Item of Note" with a brief explanation. In general, no news should be presumed to be good news.

Honor Code

While the *Instrument* is continuously amended to address new circumstances and challenges, it remains the foundation of the system of student self-governance. For more than 130 years, Carolina students have pledged not to lie, cheat, or steal. Students enjoy a great deal of freedom at Carolina and have been entrusted to hold each other accountable for maintaining a just and safe community. As such, students hear and decide all alleged cases of conduct and academic integrity violations.

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The Honor Code is found in a document known as the [*Instrument of Student Judicial Governance*](#). The Instrument is the University's official document containing the rules and regulations that guide the Honor System. The list of prohibited conduct and the possible sanctions given by the Honor Court can all be found in the *Instrument*. This document also includes information on the rights and responsibilities of all members of our community to the Honor System and under the Honor System.

Individual contributions to team assignments must represent your individual work and input.

IMPORTANT REMINDER: Individually graded assignments (i.e., Production Model and Midterm Assignments) must have the honor code pledge contained on the cover page or last page of the submitted assignment. Assignments without the honor code pledge will not be graded.

Honor Code Pledge: "By including this sentence, I acknowledge that I understand that the Honor Code applies to this assignment and that further, I attest that I have neither given nor received help in completing this project."

Valuing Diversity

Promoting and valuing diversity in the classroom enriches learning and broadens everyone's perspectives. Inclusion and tolerance can lead to respect for others and their opinions and is critical to maximizing the learning that occurs in this course. This may challenge our own closely held ideas and personal comfort zones. The results, however, create a sense of community and promote excellence in the learning environment.

Diversity includes consideration of (1) the variety of life experiences other have had, and (2) factors related to "diversity of presence", including, among others, age, economic circumstances, ethnic identification, disability, gender, geographic origin, race, religion, sexual orientation, social position.

This class follows principles of inclusion, respect, tolerance, and acceptance that support the values of diversity.

Technical Support

If you need technical support during the course, there are a number of technical support options:

General Computer Help: Contact UNC ITS Help Desk

The UNC Information Technology Services (ITS) department provides technical support 24 hours per day, seven days per week.

General computer help refers to problems with computer hardware and printers, problems connecting to UNC, and problems with software (RealPlayer, Adobe Acrobat Reader, etc.).

If you need general computer help, please contact the ITS Help Desk by phone at **919-962-HELP (919-962-4357)**, by email at help@unc.edu, by visiting their web site at <http://help.unc.edu>, or by UNC Live Chat at <http://its.unc.edu/itrc/chat>.

Course-Specific Help: Contact Course Instructor

The course instructor can provide help with course-specific technical problems.

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Course-specific technical problems refer to finding broken links or missing elements on course pages, trouble accessing course materials, etc. If the course instructor is not able to resolve the problem s/he will forward your request to the ITS Help Desk and they will respond to you as soon as possible.

When sending the course instructor an email requesting technical help, please type **TECHNICAL HELP** in the subject line of your email message so that they can respond quickly. Also, include a detailed description of your problem, including the page(s) where you encountered the problem, your phone number, preferred email, and the best time to reach you.

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Schedule for Summer 2013: **May 14, 2013 through July 26, 2013**

Lori Evarts, Assistant Professor (lead instructor) and Bill Sollecito, Professor

Assigned Lectures and Readings for the Week		Assignments for the Week
<p>WEEK 1 1st day of class Tue May 14th</p> <p>Introduction Module 1: Management Principles</p>	<p>Online Lectures: Introduction: <ul style="list-style-type: none"> Introduction / Overview (Bill Sollecito; 15 minutes) The Drug Development Case Study (Bill Sollecito; 25 minutes) Module 1: <ul style="list-style-type: none"> Production Models (Bill Sollecito; 30 minutes) Management Tools (Bill Sollecito; 15 minutes) Productivity Indicators (Bill Sollecito; 25 minutes) </p> <p>Required Reading Assignment:</p>	<ol style="list-style-type: none"> Review the Sakai course site to become familiar with the organization and pages. Click on Help to undertake a tutorial. Go to Forum page and post your Introduction to your Team Members. Post this in the "Introductions & Social Hour Section" by Wed May 15th Determine a Team Name with your Team Members (discuss on Sakai in Forum) – post decision in Forum by 5:00 PM on Friday, May 17th Go to Assignment page and complete the 3 Orientation Assignments by Sun May 19th.
<p>WEEK 2 Sun May 19th</p> <p>Module 1: Management Principles</p>	<p>Online Lectures: Module 1: <ul style="list-style-type: none"> Managerial Leverage (Bill Sollecito; 25 minutes) Decision Making (Lori Evarts; 35 minutes) Impediments to Decision Making (Lori Evarts; 20 minutes) Team Building & Delegation (Lori Evarts; 20 minutes) Subordinates (Hollie Pavlica; 5 minutes) </p> <p>Required Reading Assignment:</p>	<p>Individual Assignment available Friday May 17th</p> <p>Module 1 Team Assignment available Wednesday May 22nd</p> <p>Individual Assignment: Due by Midnight ET, Sunday May 26th Remember to submit to your individual Dropbox</p>
<p>WEEK 3 Sun May 26th</p> <p>Module 1: Management Principles</p>	<p>Online Lectures: Module 1: <ul style="list-style-type: none"> Planning (Bill Sollecito; 35 minutes) Modes of Control (Bill Sollecito; 30 minutes) Management Style (Hollie Pavlica; 20 minutes) Module 2: <ul style="list-style-type: none"> Guest Lecture: Vaughn Upshaw - "Conflict Resolution" (55 minutes) </p> <p>Required Reading Assignment:</p> <p>Recommended Supplemental Reading Assignment:</p>	
<p>WEEK 4 Sun June 2nd</p>	<p>Online Lectures: Module 2: <ul style="list-style-type: none"> Organization Charts (Bill Sollecito; 30 minutes) </p>	<p>Module 2 Team Assignment available Wednesday June 5th</p>

<p>Module 2: Organizational Principles</p>	<ul style="list-style-type: none"> Organizational Design Principles (Hollie Pavlica; 30 minutes) Organizational Transition (Hollie Pavlica; 25 minutes) Classic Organization Designs – The Flat Organization (Bill Sollecito; 20 minutes) Classic Organizational Designs – Hierarchical Structures (Bill Sollecito; 30 minutes) <p>Required Reading Assignment:</p>	<p>Module 1 Team Assignment Due by Midnight ET, Sunday June 9th</p>
<p>WEEK 5 Sun June 9th</p> <p>Module 2: Organizational Principles</p>	<p>Online Lectures: Module 2:</p> <ul style="list-style-type: none"> Hybrid Organization (Bill Sollecito; 20 minutes) Hybrid Organization--How to Make the Matrix Work (Bill Sollecito; 25 minutes) Examples of Matrix Organizations (Bill Sollecito; 25 minutes) Guest Lecture: A. Kaluzny - "Health Care Alliances" (35 minutes) Virtual Organization Model (Hollie Pavlica; 30 minutes) <p>Required Reading Assignment:</p>	<p>Module 1 Peer Evaluation Due Monday, June 10th (link provided on the Assignment page)</p>
<p>WEEK 6 Sun June 16th</p> <p>Module 3: CQI</p>	<p>Online Lectures: Module 3:</p> <ul style="list-style-type: none"> CQI Overview Lecture (Bill Sollecito; 15 minutes) Foundations of CQI (Bill Sollecito; 30 minutes) Customer Focus (Bill Sollecito; 40 minutes) Customer Feedback (Bill Sollecito; 20 minutes) <p>Required Reading Assignment:</p> <p>Recommended Supplemental Reading:</p>	<p>Mid-Term Project becomes available online at 1:00 AM UNC-time on Monday, June 17th <small>INDIVIDUAL ASSIGNMENT</small></p> <p><i>For Team planning purposes, Module 3 Team Assignment available Wednesday June 19th</i></p> <p>Module 2 Team Assignment Due by Midnight ET, Sunday June 23rd</p>
<p>WEEK 7 Sun June 23rd</p> <p>Module 3: CQI</p>	<p>Online Lectures: Module 3:</p> <ul style="list-style-type: none"> CQI Leadership (Lori Evarts; 30 minutes) Training, Motivation & Empowerment (Lori Evarts; 40 minutes) Statistical Reasoning / Statistical Process Control (Lori Evarts; 30 minutes) Tools (Hollie Pavlica; 40 minutes) <p>Required Reading Assignment:</p>	<p>Module 2 Peer Evaluation Due Monday June 24th (link provided on the Assignment page)</p>
<p>WEEK 8 Sun June 30th</p> <p>Module 3: CQI</p>	<p>Online Lectures: Module 3:</p> <ul style="list-style-type: none"> CQI in Public Health (Bill Sollecito; 30 minutes) CQI and Quality Project Management (Hollie Pavlica; 20 minutes) Guest Lecturer: P. Margolis, "CQI in Primary Care" (35 minutes) 	<p><u>Individual Assignment:</u> Midterm Due by Midnight ET, Monday, July 1st Remember to submit to your individual Dropbox</p>

	<p>Required Reading Assignment:</p> <p>Recommended Supplemental Reading:</p>	
<p>WEEK 9 Sun July 7th</p> <p>Module 4: Project Management</p>	<p>Online Lectures:</p> <p>Module 4:</p> <ul style="list-style-type: none"> • Structure (Bill Sollecito; 40 minutes) • Project Managers and Team Members (Bill Sollecito; 50 minutes) • Team Management (Hollie Pavlica; 25 minutes) • Project Lifecycle (Bill Sollecito; 50 minutes) • Project Planning (Bill Sollecito; 25 minutes) <p>Required Reading Assignment:</p> <p>Recommended Supplemental Reading:</p>	<p>Module 3 Assignment Due by Midnight ET, Tuesday, July 9th</p> <p>Module 3 Peer Evaluation Due Wednesday, July 10th (link provided on the Assignment page)</p> <p>Please Complete your Course Evaluation for PUBH 747 - Summer 2012. Thank you!</p> <p><i>NOTE: The link to complete your course evaluation will be provided to you via email by a 3rd party.</i></p>
<p>WEEK 10 Sun July 14th</p> <p>Module 4: Project Management</p>	<p>Online Lectures:</p> <p>Module 4:</p> <ul style="list-style-type: none"> • Communication Skills (Part 1) (Lori Evarts; 35 minutes) • Communication Skills (Part 2) (Lori Evarts; 30 minutes) • Meetings (Hollie Pavlica; 30 minutes) • Project Management Tools (Bill Sollecito; 35 minutes) <p>Required Reading Assignment:</p> <p>Recommended Supplemental Reading:</p>	<p>NOTE: Final Project becomes available online at: 1:00 AM ET on Sunday, July 14th</p> <p>Reminder: Please Complete your Course Evaluation for PUBH 747 - Summer 2012. Thank you!</p> <p><i>NOTE: The link to complete your course evaluation will be provided to you via email by a 3rd party.</i></p>
<p>WEEK 11 Sun July 21st</p> <p>Module 4: Project Management</p>	<p>Online Lectures:</p> <p>Module 4:</p> <ul style="list-style-type: none"> • Scope and Time Management (Bill Sollecito; 30 minutes) • Contract and Financial Management (Bill Sollecito; 50 minutes) • Project Quality (Bill Sollecito; 35 minutes) • Immunization Case Study: Project Management Review (Bill Sollecito; 25 minutes) • H. Pavlica - "Project Management Software Demonstration" (Hollie Pavlica; 40 minutes) <p>Required Reading Assignment:</p>	<p>Final Project (Module 4) Team Assignment Due by Midnight ET, Thursday, July 25th</p> <p>Final Project (Module 4) Peer Evaluation Due Friday, July 26th (link provided on the Assignment page)</p>