

Project Management Principles and Practice (PUBH 747): Fall 2017

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 apply to team-based organizations and 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 methods to achieve maximum efficiency using the application of continuous quality improvement techniques to team/project processes. The course builds on organizational, general management and leadership principles which apply to health and medical care, and which promote efficient project management.

Instructor and Primary Contact

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Objectives

The course contains four modules with the noted learning objectives for each module.

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 individual, organizational backgrounds and will be able to understand organizational principles that support project management.
- 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 used in many industries. To give students an understanding of how these concepts relate to their specific areas of public health.

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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. Examples of CQI tools commonly used by organizations will be introduced and compared.

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 lifecycle (project initiation, project planning, project execution, monitoring & control, and project closeout) from identification of project opportunities through completion of a project. Students will learn the process of developing timelines and budgets along with procedures for monitoring progress on projects.
- To employ 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 are presented. Students will be able to evaluate the current level of project management in their organizations and will also be able to manage complex technical projects in their area of public health and medical care.
- To illustrate examples of hands-on project management tools and techniques, including project management software demonstration.

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
 - It is important to obtain the 3rd edition; Lori Evarts has a handful of this text for students to borrow during the semester

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- **Optional:** 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: The above textbook is available in the UNC Libraries and required readings are available online via Sakai e-Reserves; supplemental readings are not provided/posted to Sakai.**
 - *It should also be noted that the Guest Instructor (Bill Sollecito) is the Lead Editor for this textbook and an author of selected Chapters.*

Additional Sources for Supplemental and Further Reading (Not Required Text):

- A Guide to the Project Management Body of Knowledge, (PMBOK), 5th Edition. Project Management Institute, 2013. ISBN: 9781935589679
- The Five Dysfunctions of a Team: A Leadership Fable, Patrick M. Lencioni, Jossey-Bass, 2002. ISBN: 9780787960759
- 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

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.

The University of North Carolina at Chapel Hill is committed to equality of educational opportunity. The University does not discriminate in offering access to its educational programs and activities on the basis of age, color, creed, disability, gender, gender expression, gender identity, genetic information, national origin, race, religion, sex, sexual orientation, or veteran status. The Equal Opportunity and Compliance Office (100 E. Franklin Street, Unit 110, CB #9160, Chapel Hill, NC 27599-9160 or (919)

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966-3576) has been designated to handle inquiries regarding the University's non-discrimination policies. <http://policies.unc.edu/policies/nondiscrim/>

The University of North Carolina at Chapel Hill ensures that no qualified person shall by reason of a disability be denied access to, participation in, or the benefits of, any program or activity operated by the University. Each qualified person shall receive reasonable accommodations to ensure equal access to educational opportunities, programs, and activities in the most integrated setting appropriate. This policy is consistent with Section 504 of the Rehabilitation Act of 1973. [Accessibility Resources & Service](#) provides reasonable accommodations, resources and services to undergraduate and graduate/professional students with disabilities to provide equal access to the services, programs and activities of the University so that they may, as independently as possible, take full advantage of opportunities at UNC - Chapel Hill.

UNC Honor System

The University of North Carolina at Chapel Hill has had a student-led honor system for over 100 years. Academic integrity is at the heart of Carolina and we all are responsible for upholding the ideals of honor and integrity. The student-led Honor System is responsible for adjudicating any suspected violations of the Honor Code and all suspected instances of academic dishonesty will be reported to the honor system.

Academic work is a joint enterprise involving faculty and students. Both have a fundamental investment in the enterprise and both must share responsibility for ensuring its integrity. In relation to the Honor Code, therefore, specific responsibilities of the faculty which parallel the responsibilities of the students have been formally adopted by the Faculty Council. Information, including your responsibilities as a student is outlined in the [Instrument of Student Judicial Governance](#). Your full participation and observance of the Honor Code is expected.

Individual Assignments are to reflect the work of the PUBH 747 student enrolled and not the work of other individuals or class members. **NOTE:** Individual Assignments (i.e., Production Models and Midterm) are to be posted to individual's personal Dropbox in Sakai.

Team Assignments are to reflect the work of the individual team members assigned to a specific PUBH 747 Team and not the work of other individuals or class members.

Academic Dishonesty:

Plagiarism in the form of "deliberate" or "reckless" representation of another's words, thoughts, or ideas as one's own without attribution in connection with submission of academic work, whether graded or otherwise. Plagiarism can take many forms and there may be a number of reasons why it occurs. Some examples are as follows:

- Quote and cite any words that are not your own.
- If you paraphrase the words of another, you must still give proper attribution.
- The default citation style for the UNC Gillings School of Global Public Health is [APA Style](#).
- "If you look it up, write it down."

Authorized vs. Unauthorized Collaboration:

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- All academic work in this course, including homework, quizzes, and exams, is to be your own work, unless otherwise specifically provided. It is your responsibility if you have any doubt to confirm whether or not collaboration is permitted.

Unauthorized materials:

- Course assignments will indicate if students are permitted to use old exams, outside resources, internet articles, or any other materials in the completion of academic assignments.

Resources for Additional Information:

Students wishing to seek additional information are welcome to contact the course instructor or the Office of Student Conduct at 919-962-0805 or review the [UNC Graduate Record](#).

UNC Honor Code 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."

Accessibility Resources & Service

Accessibility Resources & Service provides reasonable accommodations, resources and services to undergraduate and graduate/professional students with disabilities to provide equal access to the services, programs and activities of the University so that they may, as independently as possible, take full advantage of opportunities at UNC-Chapel Hill.

- Accessibility Resources and Service (ARS) reviews Self-ID submissions and documentation submitted via the Self Identification Form (<https://accessibility.unc.edu/selfid>) for individuals who:
 - have accepted a place at UNC - Chapel Hill who need accommodations for Placement Tests and / or their Program,
 - are enrolled and taking classes - undergraduates and graduate / professional students,
 - are needing accommodations for a graduate / professional program selection process.
- While we cannot make accommodation determinations for prospective students ARS staff are happy to discuss accommodations and provision in general terms.
- The provision of accommodations, including resources and services, is intended to ensure equal access, not guarantee success, in the academic environment.
- Accommodations are not granted as a package; they are determined by Accessibility Resources & Service on a case-by-case basis.
- Academic requirements that are essential to programs of instruction, for example grade point averages, specific prerequisite courses and so on are not considered discriminatory and cannot be modified or waived via accommodations.

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- Accommodations, resources & services received in high school or at other post-secondary institutions do not automatically transfer to UNC - Chapel Hill, although any information about such provisions will be very helpful and will certainly be considered in making a determination.
- Accommodations granted will neither fundamentally alter the nature of the educational program nor compromise educational standards.
- Accommodations cannot be applied retro-actively/retrospectively.

Your experience as a student in Post-Secondary Education will be very different to your experience in the K - 12 Sector. Postsecondary institutions are subject to a different legal framework and there is an expectation that you will be much more independent in advocating for the accommodations and support you will need. The following document from the Department of Education will be useful in explaining the key differences between the

sectors: <http://www2.ed.gov/about/offices/list/ocr/transition.html>

If you have questions / concerns, please feel free to contact ARS - Tel: 919-962-8300 or E-mail:- accessibility@unc.edu.

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%)
- Final Project (Module 4) (35%)

Graduate Grading Scale:

- H High Pass - Clear Excellence ($\geq 95\%$)
- P Pass - Entirely Satisfactory Graduate Work ($\geq 80\%$)
- L Low Pass – Inadequate Graduate Work ($\geq 70\%$)
- F Fail
- IN Incomplete*

Explanation of above permanent grades:

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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.

* A temporary grade of "IN" – Incomplete work might be assigned if unique circumstances arise. Students who are having difficulties or encounter unique life events are to contact the course instructor to evaluate their progress and determine the best course of action. **NOTE: IN is a temporary grade that converts to an F* unless the grade is replaced with a permanent grade by the last day of classes for the same term one year later.**

Team Grading Notes:

All members of a team will receive the same base grade (and if required, individual grades may be adjusted based on individual participation and punctuality on team assignments).

Each team member will also receive an individual grade on each of the four modules based on their performance as a team member via the Peer Evaluation process.

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

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:

1. Assign a Facilitator for the Module
2. Develop an Action Plan to respond to the questions in each team assignment.
 - o Clarify Team Member Roles for the team assignment – common ones are:
 - Facilitator (project manager)
 - Scheduler
 - Editor, proofreader
 - Note taker; Multimedia developer (e.g., PowerPoint, Excel); etc.
 - o Refer to the Assignment and Schedule to determine the assignment details
 - o Develop a work schedule for your team with the due date/time in mind. 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 and questions 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 your Team Forum in Sakai)** before being incorporated into the team submission.

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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 or any other individuals outside of their assigned PUBH 747 Team for this course – this is an Honor Code Violation.** However, if any individual or Team wishes to initiate contact with other class members, please contact the 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 Course Instructor informed of important individual considerations (e.g., travels, internet availability, etc.) as well as your team members.***

For each Module a process that you might consider for your Team:

1. **Individual students complete the online lectures and readings as background to generate their answers to each of the module assignment questions.**
2. **Individual students post their answers to your Team Forum on Sakai.**
3. Review, compare and discuss individually posted answers to each part of the module homework assignment. Collaborate with your teammates to develop the best team answer to the assignment questions.
 - a) **REQUIREMENT: 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 undertake this require and in particular the discussion, you can use your **Team Forum** to work at a distance or if team members agree **and all can participate**, you can work via Google Docs, Google Hangout, Skype, Elluminate Live!, or teleconference, as the situation permits. **Note: Using the Team 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 undertake in-person meetings ONLY 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 question. When multiple organizations are being used in an assignment, be sure to clearly identify the organization to facilitate the instructor's ability to put the answer into context.
 - d) Development of the team assignment can be undertaken on the Sakai Forum or via Google Docs or another method (please include the course instructor in the applications to have the ability to view the work in progress.
4. Team Assignments being submitted to the Instructor are to be posted to the Team Forum in the designated section in Sakai. See the course schedule for due dates. **NOTE: Only one team member is to post the final work product, with a descriptive title (e.g., *Team Assignment - Module 1 final version for grading*).**

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NOTE: Individual Assignments (i.e., Production Models and Midterm) are to be uploaded to individual's personal Drop box 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.

Strongly Agree	= 5
Agree	= 4
Neither Agree nor Disagree	= 3
Disagree	= 2
Strongly Disagree	= 1

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.

Technical Support

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

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.

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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 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.

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.

Course Policies and Requirements

- Class participation is expected as characterized by completing online lectures, readings and actively participating in group discussions and activities – whether undertaken through online meetings, teleconferences, posting to your Team’s Forum on Sakai, as well as other agreed upon collaboration methods as established by your course-specific team members and documented in your Team Charter.
- Assigned readings and online lectures are to be completed as designated in the course schedule to ensure robust discussions pertaining to the topic being evaluated.
- Orientation assignments are provided on Sakai for each student to complete. These orientation assignments count as individual assignments.
- Assignments (both individual and team assignments) are to be submitted to the course professor per direction provided on Sakai for each assignment.
- You are expected to attend and participant in all classes and scheduled team interactions. If you are unavoidably absent, please notify the professor and your team.
- If there is something you do not understand, ask a question. Please feel free to email Professor Evarts at lori_evarts@unc.edu or call (919) 966-9043 or drop by my office at the Gillings School of Global Public Health (4109 McGavran-Greenberg Hall). ***However, please ask your question, as it is likely something that other class members might also not understand.***
- Questions and replies that are addressed with the professor that are relevant to other class members will be posted to the course Sakai site (see ***CLASS FORUM***) for clarification and communication for all.
- The Honor Code described above is in effect for the duration of this class. If you have a question about how certain activities, especially group activities, might be interpreted under the Honor Code, please ask.
- Students are responsible for registering with [Accessibility Resources and Service](#), as appropriate to their circumstances, in order to receive accommodations and support in the completion of course requirements.
- A grade of incomplete may be taken only because of illness or special circumstances and ***only with the permission of your departmental adviser and the course professor.***

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- The course professor reserves the right to make changes to the syllabus, including due dates, when unforeseen circumstances occur. These changes will be announced as early as possible so that students can adjust their schedules.
- ***As an online course, each student must maintain a working computer and internet access from the first day of class in Summer I and through the final exam period in Summer II. Any issues encountered that may cause difficulties should be communicated to the professor and course team members as a priority.***
- This course does not involve a teaching assistant.

Schedule

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