Project management worksheet

**Project details**

The purpose of this section is to organize the team’s thinking about the project.

* Give the project a *name* that has meaning for the team as well as any stakeholders
* Set the project *start date*. Have a kickoff meeting to get everyone involved in the project engaged in the activity.
* Set a definite *end date*. Don’t let the project keep going forever; determine what you want to accomplish by a certain date. Use the project milestones section to identify intermediate milestones that will keep the team on track to meet the project goals.
* The *purpose* is the vision that explains why the group is going to tackle this project. What is it going to make better? What will the impact of the improvement be?
* The project *goal(s)* will be accomplished when the project is complete. Some practices may use the SMART acronym (**S**pecific, **M**easurable, **A**chievable, **R**elevant, **T**ime-bound) to define their project goal. Clearly defined goals will help the team stay on track and not lose valuable time focusing on items that are out of scope or misaligned with achieving the project objective.
* Any *resources* required to accomplish the goal(s), such as personnel, finances, time, etc., should be determined in advance.

**Team member roles and responsibilities**

This section identifies the people who are involved in the project and the specific parts they will play. Example roles for team members include:

* Leader
* Champion
* Project manager
* Core team member
* Subject matter contributor (for those who will be involved occasionally)

Identifying the responsibilities of people who fill different roles on the project team will keep people focused on the work. It also will give people the opportunity to develop a new skillset. For example, a practice may have a social worker act as the project manager and a physician on the team as a core team member. Clarifying roles and responsibilities ensures that there is no overlap of these areas on the project team. Those who run the meetings and those who provide subject matter expertise know their role and responsibility in advance. This will help the team’s work progress smoothly.

**Project milestones**

Define the project milestones and determine which milestones the team must accomplish and when to propel the team toward the project goal. For example, to implement team-based care in your practice, milestones may include: determining the new practice model, training staff and creating a plan for a phased implementation. These milestones should be clear so the project team knows what must be accomplished to consider the milestone met. Assigning due dates will also keep the team and project on track.

**Task list**

Undertaking a large project will require that many smaller tasks be completed to keep the work moving at the desired pace. Identify what those tasks are and who is responsible for them. Consider creating a taskforce to accomplish the responsibilities that make up each project milestone. For example, in the “training staff” milestone that is part of a team-based care project, the nurse manager may be the point person who works with a physician lead, nurse, medical assistant and human resources representative to accomplish the following tasks:

* Create a new job description for the team care coordinator
* Identify competencies for the team care coordinator
* Work with human resources and physician leaders to develop a multi-faceted training program
* Schedule time for team care coordinator training
* Test the coordinator’s new skillset in simulated patient visits with the project pilot team

**Project details**

|  |  |
| --- | --- |
| Project name: | |
| Start date: | End date: |

|  |  |
| --- | --- |
| Purpose: |  |
| Goal(s): |  |
| Resources: |  |

Team member roles and responsibilities

|  |  |  |
| --- | --- | --- |
| Team member name | Role | Responsibilities |
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|  |  |  |
|  |  |  |

Project milestones

|  |  |  |
| --- | --- | --- |
| Milestone | Accomplishment | Deadline |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |

Task list

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Task description | Task Owner | Status | Deadline |
| 1 |  |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |
| 4 |  |  |  |  |
| 5 |  |  |  |  |
| 6 |  |  |  |  |
| 7 |  |  |  |  |
| 8 |  |  |  |  |
| 9 |  |  |  |  |
| 10 |  |  |  |  |
| 11 |  |  |  |  |
| 12 |  |  |  |  |

*Source: AMA. Practice transformation series: preparing your practice for change. 2015.*