



OH&S Project Management: Tips for OH&S Professionals

**Presented by
Dianne Dyck
Progressive Health & Safety Consulting
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OH&S Project Management

- **The discipline of organizing & managing resources so these resources deliver all the work required to complete a project within defined scope, time & cost constraints**

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PROJECT

- **A temporary & one-time endeavor undertaken to create a unique product or service that brings about beneficial change or added value**

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PROJECT MANAGER

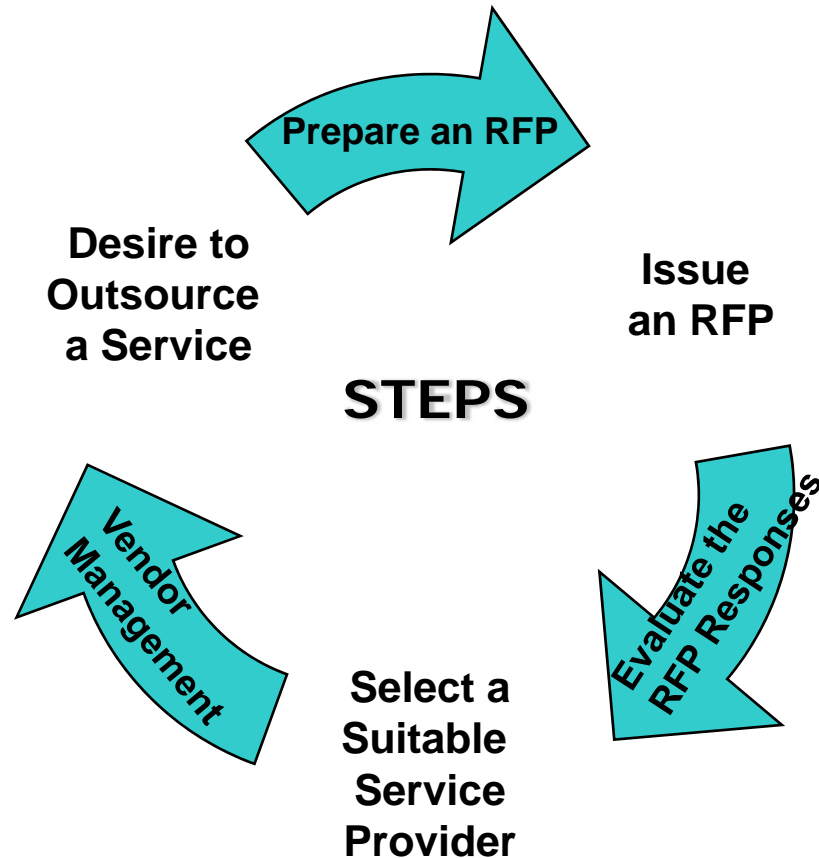
- **Assumes responsibility for the management of the project**

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Why Manage Projects?

" Given that most projects (67%), especially the large ones, do not meet their stated targets & goal, good project management skills are essential."

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REQUEST FOR PROPOSAL (RFP)

- **An invited bid, or open bid, that explains what the customer is interested in procuring & provides instructions on how to prepare & submit a proposal**

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REQUEST FOR PROPOSAL

Describes to Bidders:

- **Scope of the project**
- **Procedure to acknowledge RFP receipt**
- **Acceptable format for the proposal**
- **Terms for proposal response submission**
- **Terms for proposal response rejection**
- **Length of time for bid acceptance**
- **Potential method for proposal clarification**
- **Organization's policy on maintaining bidder information confidential**

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RFP RESPONSE: RESPONSE TIME

- **Allow plenty of preparation time**
(2-3 weeks for small projects: 4-6 weeks for large ones)
- **Know HOW the client wants the proposal to be submitted, including the closing time & date**

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RFP RESPONSE: DETAILS

- **Understand the nature of the services being sought**
- **Know expected standard/quality of service**
- **Determine desired level of service performance, or product**
- **Establish if there is a “fit” between the customer’s & your company’s philosophies**

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RFP RESPONSE: TIPS

- **Carefully read & understand each of the submission requirements & questions posed**
- **Determine *WHY* the customer is going to the marketplace: what was it about the current approach/current service provider that is not working**
- **Demonstrate capability, adaptability, flexibility & willingness to work with the customer**
- **Indicate why you/your company should be selected – how do you stand out from the rest?**

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RFP RESPONSE: WRITING

- **Know the customer** – write from the customer's perspective
- **Provide the requested information**
- **Know what the customer is really requesting**
- **Prepare an outline**
- **Use a professional proposal format**

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RFP FINALIST INTERVIEW

- **These are formal presentations in which the service providers describe their business, service capabilities, staff qualifications, provider network, facilities, data management systems, past successes & future plans**

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FINALIST INTERVIEW: TIPS

- **Come prepared & polished**
- **Know the audience: “play” to them**
- **Answer the provided questions in an honest, direct & concise manner**
- **If you do not understand what the customer is asking, take the time to explore their question: it shows you can listen**
- **If invited, do a short presentation on your company**

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FINALIST INTERVIEW: TIPS

- **Show your strengths**
- **Be ready for questions like, *"Have any companies recently discontinued your services? If so, why?"***
- **Listen to what the customer is asking for – do not adopt the approach: *"I am the expert, & therefore, I know what is best for you"***
- **Avoid "canned" approaches & presentations**

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SERVICE CONTRACT: DEVELOPMENT

- **Begins at the onset of the project**
- **Can involve use of a standardized corporate service contract template**

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SERVICE CONTRACT: DEVELOPMENT

○ **Contract Elements:**

- **Description of services to be provided**
- **Expected level of service quality**
- **Required levels of reporting & communication**
- **Mutually agreed upon service performance measures**
- **Responsibilities of each party**
- **Pricing agreement**
- **Duration of the contract**
- **Payment schedule**
- **Legal compliance**
- **Hold harmless clause**
- **Required business insurance coverage**

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S. CONTRACT DEVELOPMENT: Tips

- **Understand each contract element**
- **Stipulate expected levels of performance for customer & service provider**
- **Include regular measurement of performance & outcomes**

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PROJECT MANAGEMENT: STAGES

- 1. Project Conception Stage***
- 2. Project Initiation Stage***
- 3. Project Design Stage***
- 4. Project Execution Stage***
- 5. Project Monitoring & Control Stage***
- 6. Project Closure Stage***

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PROJECT MANAGEMENT: STAGES

1. Project Conception Stage

- Formation phase, or the birth of the project idea
- Can be formal, or informal, in nature
- Addresses:

"Should we do this project?"

"Can we do this project?"

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PROJECT MANAGEMENT: STAGES

2. Project Initiation Stage

- Phase in which project plan is developed
- Must determine the proposed project's nature & scope
- Need to align with customer's business strategies
- Time to build in project containment & protection controls
- Create a **project definition document**
- This phase needs to be done well

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PROJECT MANAGEMENT: STAGES

3. Project Design Stage

- The start phase
- Involves:
 - Planning the work (*i.e.*, develop a workplan)
 - Analyzing & design of the project objectives
 - Assessing & controlling foreseeable risks
 - Estimating the needed resources
 - Defining the services/products of the project
 - Allocating the resources
 - Setting up the necessary tracking systems
 - Announcing the project to stakeholders
- Planning is critical to the success of the project

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PROJECT MANAGEMENT: STAGES

4. Project Execution Stage

- The performance phase
- Involves:
 - Organizing the work
 - Acquiring human & material resources
 - Assigning work tasks
 - Doing tasks
 - Directing activities
 - Fixing emergent problems
 - Keeping stakeholders informed
 - Controlling the project execution



SO, ... HOW'S YOUR DAY GOING?

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PROJECT MANAGEMENT: STAGES

5. Project Monitoring & Control Stage

- Includes:
 - Tracking & reporting progress of project activities
 - Analyzing the results
 - Forecasting future trends in the project
 - Quality management
 - Issue management
 - Issue solving
 - Prevention of the delivery of substandard service/products

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PROJECT MANAGEMENT: STAGES

6. Project Closure Stage

- Involves:
 - Formal acceptance by the customer
 - Completion of the project arrangement
 - Withdrawal of services – You are done!

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WHAT CAN GO WRONG ?

- **Lack of due attention to project planning**
- **Poor communication**
- **Poorly defined project goals**
- **Failure to identify project risks at the onset**

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WHAT CAN GO WRONG ?

- **Poor project management practices**
- **Failure to manage customer expectations**
- **Scope creep**
- **Customer fails to understand & approve requested changes to the project**

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WHAT CAN GO WRONG ?

- **Personality incompatibility**
- **Disagreements**
- **Failure to comply with agreed upon OH&S service quality standards & regulations**
- **Labour unrest**

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PROJECT SUCCESS: HOW TO'S

- **Develop a project plan**
- **Work the project plan**
- **Strive for superior project team performance**
- **Track project activities & time**
- **Monitor project costs**
- **Manage customer expectations & perceptions**

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PROJECT REPORT

A mechanism in which the project manager has the opportunity to:

- **Verbalize the project findings**
- **Provide a historical record of the information shared**
- **Share the same message with a wide audience in an expedient manner**



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Project Report

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PROJECT REPORT: PREPARATION

Format:

- Title Page
- Executive Summary
- Table of Contents
- Project Description
- Discussion of Project Results
- Recommendations
- Conclusion
- Appendices

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PROJECT REPORT: PREPARATION

Content:

- Presented concisely & factually
- Speaks to a number of audiences
- Considers the attitude of the target audience(s)
- Know the educational background & work experience of the audience(s)
- Written in a professionally
- Write clearly: limit professional jargon
- Watch the tone

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PROJECT REPORT: PREPARATION

Additional Tips:

- Keep it interesting
- Use an acceptable writing style
- Watch the grammar, punctuation, & spelling
- Write in the “third-person
- Know & use the customer’s accepted report writing style
- Use sub-headings to focus the reader’s attention;
- Compare the actual project performance with the planned project performance
- Proof-read the report

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PROJECT REPORT: PREPARATION

Limitations:

- Reports don't allow for verbal exchange, feedback, or other forms of interaction between the author & audience
- Author can't verify that the audience interpreted the intended message
- Author never really knows if the report was read
- It is also important to realize that project reports rarely stand alone



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Project Report Presentation

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PROJECT REPORT: PRESENTATION

Most project reports are accompanied by an oral presentation. Why?

Because the reader/audience will seek further clarification of the OH&S issues as part of their problem-solving & decision-making process

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PRESENTATION: PREPARATION

Step 1: Plan

- **Know the audience**
- **Determine their anticipated reaction**
- **Decide the intended message(s)**
- **Determine the evidence needed to support that message**
- **Decide how to structure the delivery of that message**
- **Decide the presentation length**

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PRESENTATION: PREPARATION

Step 2: Prepare the Introduction (**RAMP**)

- Lays the foundation for the report
- **R**apport: Engage the audience
- **A**ttention: Show how the OH&S project relates to & is important to them
- **M**ain message: Preview the main message(s)
- **P**lan: Explain the structure of the presentation

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PRESENTATION: PREPARATION

Step 3: Prepare the Body

- **Develop the argument for the main message(s)**
- **Provide clear data/evidence, relevant examples, pertinent anecdotes, & supporting OH&S practice/research findings**
- **Periodically, re-orient audience to the presentation's structure**
- **Explain relevance of each section**

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PRESENTATION: PREPARATION

Step 4: Prepare the Conclusion

- **Reinforce the main message(s)**
- **Summarize key elements & points**
- **Motivate audience to action**
- **Capitalize on increased audience attention towards end of a presentation**

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PRESENTATION: PREPARATION

Step 5: Prepare for Tough Questions

- **Prepare for & practice answers to likely questions**
- **Anticipate & prepare for the tough questions**
- **Be able to explain & support any assumptions made during the OH&S project**
- **Set & adhere to a time limit for the question period**
- **Control the question period**

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PRESENTATION: PREPARATION

Step 6: Prepare Visual Aids

- **Keep visual aids must be simple, clear, & pertinent**
- **Plan them carefully so they add to, not detract from the message**
- **Create clear, dynamic & colourful visual support materials that enhance the presentation message**

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PROJECT PRESENTATION

Two Factors Influence the Preparation:

- **There is no written record**
- **The need to understand & use non-verbal communication techniques (body language) carefully**

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PRESENTING

"People are afraid of public speaking... In fact, most say that it's their number one fear. Death, apparently, only comes second."

Jerry Seinfeld

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PRESENTATION: TIPS

- **Prepare the presentation materials yourself**
- **Put reminder notes on each slide**
- **Plan the time required & adhere to it**
- **Know the contents of the OH&S report**
- **Know & rehearse the presentation**

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PRESENTATION: TIPS

- Write down the opening statements
- Know what the anticipated audience reaction to the report will be
- Practice & be comfortable with an effective delivery style
- Rehearse the presentation
- Stick to the allotted time

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PRESENTATION: TIPS

- **Keep the presentation short & concise**
- **Avoid distractions**
- **If possible, become familiar with the room where the presentation will be delivered to know how loudly to talk & how people will be seated**

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AN EFFECTIVE DELIVERY STYLE

- **Demarcate the beginning & end of each point & segment**
- **Announce each main topic**
- **Pause after the completion of the introduction, then, announce the first topic**
- **After the final topic in the main body, pause before beginning the conclusion**

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AN EFFECTIVE DELIVERY STYLE

- **Speak slowly, vigorously & enthusiastically**
- **Enunciate words carefully**
- **Use gestures to accentuate points**
- **Use body movements to aid in announcing major transition points**

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AN EFFECTIVE DELIVERY STYLE

- **Do not memorize: One forgotten part will end up with confusion & panic**
- **Use brief notes**
- **Highlight key points as “refreshers”**

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AN EFFECTIVE DELIVERY STYLE

- **If possible, record the rehearsed presentation:**
 - Listen objectively to what was said
 - Consider the main issues of audience, purpose, organization, context, content & style
 - Listen for tone, attitude & clarity
 - Make necessary adjustments

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PROJECT REPORT PRESENTATION

"No matter what type of presentation, ultimate success as a speaker & the success of the presentation, depend on the presenter's ability to establish credibility with the audience."



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IN PARTING.....

Project management is an important business skill for the OH&S Professional to possess. When done effectively, it can set the OH&S Professional apart from other workplace professionals.



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