

2013 SACSCOC Annual Meeting Presentation Proposal

Chaos to Clarity

Applying Standard Project Management Methodology to Compliance with the *Principles of Accreditation*

Presenters

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Abstract: In January 2012, Augusta State University and Georgia Health Sciences University learned they would be consolidated to form Georgia Regents University. To organize the work needed for SACSCOC approval, standardized project management techniques were employed to coordinate substantive change reporting and plan the visit by a Substantive Change Committee. Staff from Georgia Regents University will educate attendees on basic project management and discuss how they are applying the methodology to ongoing compliance with the *Principles*. Attendees will receive templates that can be used at their own institutions. No experience in project management is necessary to benefit from this presentation.

Background and Rationale for the Topic

In January 2012, the Georgia Board of Regents announced plans to consolidate eight of its member institutions to establish four new universities. Among these were Augusta State University and Georgia Health Sciences University, two institutions with immense differences in mission, student body, program array, faculty governance, and administrative structures. It was immediately clear that this consolidation would require careful engineering to minimize the chaos as much as possible. To manage this process, a project manager was assigned to facilitate the organization of hundreds of initiatives to lead to consolidation. Among the highest priorities was the process for seeking approval from the SACSCOC Board of Trustees through the development of a Prospectus. To support the Project Manager in orchestrating all details of the consolidation, an administrator focused on accreditation was assigned to ensure continuous and organized movement toward developing the Prospectus. The development of the Prospectus – including structured reviews from stakeholders – went so smoothly, the university has adopted the use of the methodology for the next phase of the consolidation – the development of the Documentation for a Substantive Change that is due months following the official consolidation and for planning the Substantive Change Visit.

The methodology used for this process is based on the Project Management Institute's "Project Management Body of Knowledge" – or the PMBOK® Guide and Standards. By using a set of universal and tested standards and practices for managing projects, leaders have been able to more quickly identify the "who, what, when, and how" without getting overwhelmed by a blank canvas. A project management framework can help guide the scope, time, quality, human resources, communications, and risks associated with an accreditation project. A key and often overlooked element of the methodology is the communication plan, which forces organizers to consider all the stakeholders who should have a role in developing documentation. This is particularly important in the case of GRU's substantive change, which is dependent on policies, artifacts, and other information that is being established concurrent with writing reports; having the benefits of hundreds of eyes on the documents is absolutely critical, particularly when developing the reports within an aggressive timeframe. Another important feature is the emphasis on monitoring of progress. For the Substantive Change Documentation, status updates are provided every two to four weeks, reporting up the organization on accomplishments, next steps, and most essential – critical issues. Any critical issue is elevated up the organization until it has been resolved or is moving toward resolution.

As the process of developing a Substantive Change Document and planning a committee is so akin to a reaffirmation, GRU is confident that this is the ideal approach for developing processes for ongoing compliance with the *Principles of Accreditation* and preparing for its next reaffirmation in 2016. Immediately following the Substantive Change Visit in September 2013, the university plans to implement projects for developing the Compliance Certification and Quality Enhancement Plan, both due less than three years following the consolidation. The ultimate benefit of using a project management framework is that, while the methodologies are used worldwide, they are flexible enough to be adapted by any university regardless of its culture or structure and within any timeline needed. Additionally, one need not be certified as a Project Management Professional to apply the practices. Basic understanding of project management processes to determine which tools and techniques are

needed and how to use them is all that is required. We are happy to share our experience to assist other universities in using this approach.

Objectives of the Session

The **first objective** of the session is to empower participants with the confidence to apply these methodologies to their own efforts in coordinating the development of reports and site visits, regardless of past experience with or knowledge of project management techniques. Standard project management is rarely associated with academia, and certainly it is not commonly applied to the administrative operations of the university. Further, many academic officers are turned off by the seeming rigidity of the techniques and the belief that one must be a certified Project Manager to apply the methodology. In actuality, the techniques are very flexible and scalable to allow customization to a particular university's culture and organization and to a project's unique purpose.

The **second objective** is to dispel the myth that utilizing these methods holds up progress to accomplishing a task. This is particularly important for accreditation reporting, which necessitates involvement from a number of parties throughout the university. As evidenced by the number of presentations on the topic at each SACSCOC meeting, approaching a major accreditation report or event requires a significant amount of coordination regardless of the technique used. However, most universities immediately jump into the process without taking time for the critical planning to engage stakeholders in identifying major tasks and risks and creating the buy-in for the magnitude of the project. In addition, many universities recreate the wheel by developing their own processes, documents, and other resources to accomplish this task, not knowing for sure that their approaches will work. By employing standardized templates and techniques based on proven methods of project management, officers responsible for coordinating accreditation activities can ensure the right individuals are involved and monitor progress toward milestones throughout the development of reports and planning of events.

The **third objective** is to provide participants with a basic knowledge of project management principles and the practical tools to take to their own universities, including providing them with sample and blank templates and guidelines for how to use them. Participants will leave the session with a thumb drive containing all of the templates provided, including samples from GRU's process.

Connection to the Theme

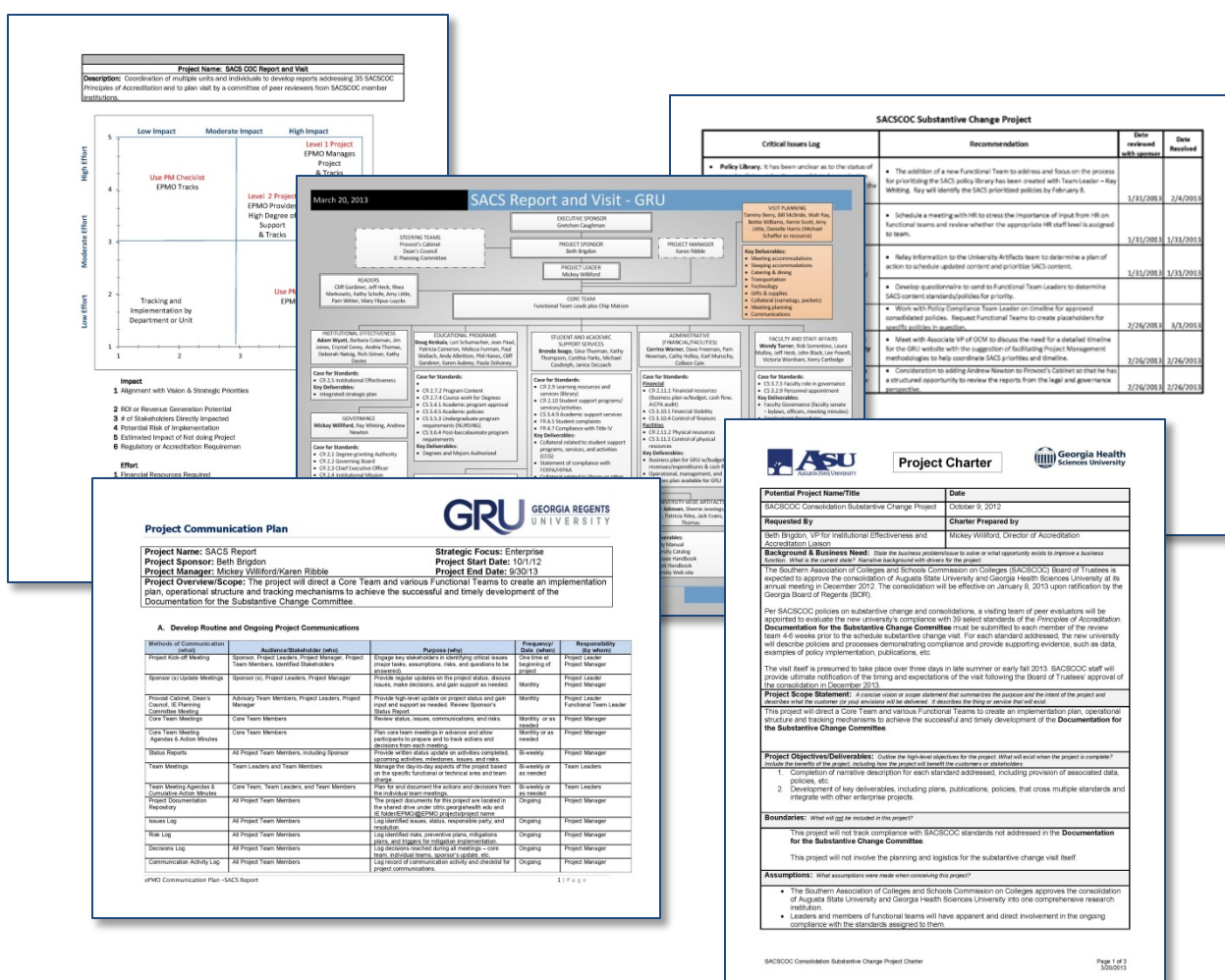
This presentation will connect to the meeting's theme through Strand 3: Good Practices in Accreditation. By describing how GRU organized the effort to complete its prospectus and documentation for a substantive change – one that was immensely complicated – attendees can draw comparisons to their own universities and consider how our experience can benefit their own accreditation activities.

Expected Outcomes for Participants

Participants are presumed to have little or no experience in standardized project management techniques. Attendees' experience with organizing accreditation activities will likely vary from no understanding of what is involved to highly experienced. With these assumptions in mind, we expect participants to leave the presentation with the following outcomes:

1. Attendees will recognize the complexity of preparing accreditation reports in an appropriately inclusive manner and planning accreditation visits, if not aware prior to attending this presentation.
2. Attendees will demonstrate basic understanding of the tenets of standard project management and how to apply them to any project.
3. Attendees will learn how to use the templates provided, including roles matrices, charters, communication plans, schedules, and status updates and logs. (See Figure 1 for samples)
4. Attendees will discuss how these techniques could be employed at their own universities to streamline accreditation reporting and planning.

FIGURE 1: Sample Project Management Templates to Be Discussed and Provided



Engagement of Participants

The presenters plan to open the session with an audience poll: how many people does it take to develop a SACSCOC report? We will have informally collected some numbers from other universities prior to the session so that we can provide some real-world answers to our question. This question will quickly drive home the point that there are too many important stakeholders in developing these reports – and the reports are too important – to waste time on designing a development and implementation process that hasn't been tested.

From there, the presentation will be structured via Powerpoint as follows:

- Williford will provide background on the impetus behind using project management to organize the consolidation and the development of the required SACSCOC reports.
- Ribble will provide an overview on project management methodologies, covering key elements for any project.
- Williford and Ribble will lead the group in a “fill-in-the-blank” exercise in which templates used by GRU are presented with some information removed. The two will lead discussions about how others might implement such a project at their own institutions, and then reveal how GRU handled the situation.

Presenters

Mickey Williford is the Director of Accreditation at Georgia Regents University (GRU). She has provided critical support and coordination for two SACSCOC reaffirmations as well led efforts for the SACSCOC Board of Trustees' approval of the substantive change to consolidate Augusta State University and Georgia Health Sciences University to establish GRU. In addition to implementing processes to ensure ongoing compliance with both regional and programmatic accreditation requirements, Williford also manages the university's program review procedures. She holds a Master's of Public Administration.

Karen Ribble is a Project Manager at Georgia Regents University (GRU), specializing in projects identified to improve the quality of the educational mission. Prior to joining the university in 2012, she served 10 years with the Columbia County Board of Education, participating in coordination of accreditation from the SACS Commission on Accreditation and School Improvement. Ribble has project management experience in the telecommunications industry and K-12 education sector and holds a Bachelor's in Business Administration.