PROJECT ADMINISTRATION:
ACHIEVING SCHEDULE CONTROL ON A LARGE PROJECT
--- THE SOMERS PROJECT ---

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What This Paper is About

This paper describes how to implement project planning, tracking, and reporting in order to control a large complex project when many of the project team's managers and participants have limited prior experience implementing formal project management. The Project Administration methodology, which evolved as a by-product of the Somers Project, is one step removed from hands on project management. It provides a project administration service for the project managers, helping them to define their plans, coordinate their activities across many organizations, and motivates them to maintain their committed schedules. The techniques that became Project Administration as the Somers Project progressed will be described against the backdrop of this live example. It is hoped that the reader will find this information to be useful for planning and controlling his own projects.

Project Administration Objectives

Project Administration focuses on two objectives. One is relieving the project team to as great a degree as possible from the burden of project management's administrative responsibilities. The second objective is achieving schedule control. It views project management as a process control system. Once plans are built and the project is executing a feedback loop is provided in the form of clear easy to understand status reports that the project participants and managers use to adjust their activities. The commitment of the project's executive sponsor is leveraged to motivate the project managers and participants to respond to the feedback. It is the challenge of the PA (Project Administrator) to ensure that the reports are clear, focus attention on what needs to be done by whom, and that each project manager and participant knows that everyone including the executive sponsor is receiving the reports.

What is the Somers Project?

Somers is a brand new five building site built to house 2300 headquarters executives and their staffs for the five lines of business and their domestic divisions of the IBM Corporation. It lies 50 miles north of New York City in rural northern Westchester county. The central services building (CSB) houses the 58,000 square foot raised floor (computer room) facilities and the computer operations staff as well as the other common site facilities such as the cafeteria, conference rooms, auditorium, supplies, medical staff, security, banking, sundry shop, etc. The four office buildings (OB's) house the headquarters executives and their staffs.

Regional Headquarters I/S (I/S = Information Systems - used to be known as data processing) is part of the ES (Enterprise Systems) line of business. Regional HQ I/S has been consolidating an increasing number of computer centers in the New York, New Jersey, and Connecticut area for the other IBM lines of business and their divisions over the last several years. Each system HQ I/S takes over is "regionalized" so that its software and operating characteristics become similar to the other systems in the region for ease of maintenance and operations. Regionalization in this and other IBM US regions has saved the corporation a considerable sum of money and headcount.

Thus in preparing for the move to the new Somers headquarters facility it became the task of Regional HQ I/S, which already operates many of the systems in the area, to prepare the site for the systems we operate, wire the buildings and all their offices for workstation communications and printing capability, move all regional computer systems to the new site, and move the executives' workstations to the new site as each of them moved.

John Stone was the director of Regional HQ I/S at the start of this project. In a July 1988 memo to his organization John outlined his objectives for the Somers project:

- Project 1: Fitup the Somers CSB I/S facility and four OB's,
- Project 2: Move 2200 headquarters lines of business people from lower Westchester to Somers, and
- Project 3: Relocate all regional customer computer systems to Somers.

And his criteria for success:

- Meet the committed schedule,
- No disruption in customer service, and
- Achieve the stated financial goals.

Project Management Challenges

The Somers project had neither a sharp starting point nor a firm set of end objectives. Planning for the site had begun in the early 80's. HQ I/S could plan the floor layouts and cabling and order equipment but could not do any physical work at the site until the C/O (certificate of occupancy) was available for the CSB. But construction delays made the C/O dates for the five buildings almost impossible to predict.

The end was not well defined because negotiations continued with other organizations to regionalize and move their systems during the life of the project. When the project was over a number of systems had been moved that were not anticipated at the start.

Project timing was squeezed from both ends. C/O dates were constantly being delayed. And leases on office space where our future Somers tenants worked were coming up for renewal challenging us to build schedules that would prepare the facilities and move people and equipment to Somers before we incurred the costs of lease extensions. Thus the project teams, when finally underway, had to execute as efficiently as possible to avoid penalties.

This was far and away the largest most complex project Enterprise Systems Regional HQ I/S had ever attempted.

Complexity

Figure 1 conveys, at a high level, an example of the complexity of the project in terms of both the many hardware interfaces and organizational interfaces. The upper portion represents the Somers site and the lower portion a typical site in lower Westchester. The center of the diagram indicates the names of each organization responsible for the components directly above and below them. For example, Network Implementation is responsible for wiring 3299's and work-station drops in both the Somers OB's and Lower Westchester sites. Eight different organizations are represented across the middle. Three, NSD, NPN, and RECS, are outside the Regional HQ I/S directorate.

Regional HQ I/S Project Management Achievements

The C/O for the CSB finally materialized the end of August 1988. The project team fitup the CSB and prepared the facility for the first occupants to move in the end of October. Over a

14 month period from August of 88 to October of 89 the 150 person project team moved 18 computer systems and 2300 executives and their staffs to the five building complex. Twenty-six first line organizations crossing three corporate vice presidencies defined 210 plans containing 5472 tasks which coordinated 30 person-years of work effort, an average of 112 tasks or 88 person-days of work effort per week. Fifty major milestones were completed on schedule to the exact day with no disruptions to customer service, and the project's financial objectives were exceeded.

ENVIRONMENTAL CONDITIONS FOR SUCCESS

Four environmental factors contributed to the success of this effort. Three are the raw materials, the fourth is the glue.

Raw Materials
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1). STRONG EXECUTIVE SPONSOR: At the start of the project HQ I/S director, John Stone, made his vision for this project perfectly clear in his July 1988 memo to the organization. All levels of management recognized that their performance appraisals would be tied to their contribution to the project's success. And, when Phil Daddona took over as director in September he continued that commitment.

2). COMPETENT, EXPERIENCED, MOTIVATED DOERS:
"Competent" participants are expert at what they do and get it done right. Competent people at all experience levels make a significant contribution. The optimum mix of experience levels is a challenge when forming a project team.
"Experienced" plan contacts, responsible for planning, were able to give accurate estimates of how long each of their team's tasks should take.
"Motivated" participants fill in the missing pieces. No matter how much care is taken in the construction of detailed project plans one can never account for all the detail or unforeseen events that must be handled.
"Doers" don't obsess over their plans, what they're going to do, or how they are going to do it. They act. They make it happen.

3). SUFFICIENT RESOURCES:
Without sufficient money, materials, space, supplies, tools, equipment, etc., project success will be threatened.

The Glue
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4). AN INDEPENDENT PROJECT MANAGEMENT ORGANIZATION:
Project Administration takes place in a separate organization reporting directly to the project's executive sponsor. It provides a project management service for the rest of the project team and relieves them of most of the planning, tracking, and reporting responsibility. This organization consists of a PA (Project Administrator) and several project managers. The PA helps the participating organizations define their plans, and then tracks and reports their progress. The project managers are called upon as required to manage parts of the project that the responsible line managers have difficulty handling. Thus the organization provides all the project management tools, skills, and services needed by the project teams. Pete Lambertson's Relocation Planning department provided the INDEPENDENT PROJECT MANAGEMENT ORGANIZATION function for the Somers Project.

EVOLUTION OF PROJECT ADMINISTRATION

STARTUP

I joined Pete Lambertson's Relocation Planning organization April 15, 1988. My function, although not known by that title at the time, was Project Administrator. The C/O for the CSB was anticipated in May. Planning of the facilities had been under way for some time. Each organization had a task plan and, at a high level, there was a management objectives Gantt plan for CSB fitup hand drawn by Pete on a set of flip charts. Coordination meetings consisted of reviewing lists of task dates maintained in text form. No project management tools were employed. When the C/O date for the CSB slipped from May to June everyone was relieved that some additional preparation time was available. It was believed that a project management tool could pull the existing plans into a coherent interrelated sequence of events.

THE PROJECT MANAGEMENT TOOL

This paper will not address the choice of a specific tool but instead will describe in general terms the characteristics that a tool should have in order to support the project administration methodology. It cannot be overemphasized that the key to PM success is not the tool but rather closing the loop between planning, doing, tracking, and reporting.