

# **Project Management Beyond the Competency Framework**

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# Agenda

- **1:30 Acknowledgements / Introduction**
- **1:40 The Competency Framework**
  - **Development**
  - **How to use the framework with a team**
- **1:55 Workshop/Review Feedback**
  - **Expected level of competencies for PMs**
  - **Additional skills - Technical personal /interpersonal skills or business knowledge**
- **2:35 Mentoring a project team**
  - **Primary personal and business skills**
- **2:50 Wrap-up**

# Acknowledgements

- Walter Wawruck's presentation May 15, 2012:  
**“Assessing Project Management Competence” - 6 Levels**
  - Awareness
  - Knowledge
  - Advanced Knowledge
  - Skill
  - Ability
  - Advanced Ability
- Fraser Health Primary Care a consulting project  
March – July 2013:  
**Competency Framework Development –  
Joan Rabillard, Manager, Georgia Bekiou, Director  
Darlene Hope-Ross - Consultant**

# Introduction

- **Competency Framework for Primary Care Portfolio**
  - **Multiple initiatives; various project phases**
  - **New staff to project roles, some with little or no healthcare experience**
  - **Project teams augmented by external consultants**
  - **Standardize project delivery / process improvements**
- **Build on PMO concepts**
  - **Improve status reporting to key stakeholders**
  - **Clarify inter-project and intra-project relationships**
- **Improve Project Management Maturity**
  - **Beyond standard language to repeatable processes and predictability of success**

# **The Competency Framework**

# Step 1: Identify Project Team- Roles and Responsibilities

- Role definition specific to primary care organizational structures:
  - Operational Managers (Manager & Lead),
  - Project Managers (Practice Lead & Project Lead),
  - Evaluators,
  - Change Managers & Communication Specialists,
  - Operational Engineers,
  - Data Analysts,
  - Project Support

## Step 2: Define key elements in each competency group

- **A collaborative exercise elaborating Technical, Interpersonal & Personal as well as Business Behaviours to use for all team roles:**
  - **Technical skills - include specialized skills such as those for Evaluator and Change Manager**
  - **Personal skills - in specific areas are emphasized for roles involved with a key stakeholder group (primary care physicians)**
  - **Business skills - often underestimated in roles that have a significant technical requirement such as Data Analysts.**

## Step 3: Assign expected level of competency in the matrix

- **An important collaborative exercise to gain agreement on expectations across the team.**
  - **The leadership in each role will emphasize the importance of unique competencies compared to other roles:**
    - **e.g. Change Managers would expect that change management Ability and Advanced Ability (levels 5 & 6) will be available / expected from their resources and others will rarely have (or need) this higher competency level.**
  - **Obviously this is where the agreement across the leadership is necessary.**



## Step 4: Assess each resource on its actual level of competency

- **The agreed matrix is a tool to gauge each individual's actual level of competency.**
- **It is also a helpful tool to demonstrate the expected skill levels for the whole team.**
- **For team members who are not at the expected level, it provides an opportunity to work on increasing the desired competency.**
- **For team members above their expected skill level, it identifies an opportunity to use their skills to coach / mentor others.**

Any Questions So Far?

# Workshop/Exercise

Time to complete: 15 - 20 min  
2:15 pm

# All Tables

**As** you are completing your task also consider the following:

1. How might you use this tool in mentoring a team member?

2. How would you use this tool to assess the skill for team member?

# Each of Tables 1 and 2: PM1

**Use the Handouts –**

- Handout 1- Representative Competency Behaviours and**
- Handout 2 - Matrix – with all roles**

**COMPLETE THE WORKSHOP MATRIX FORM (HANDOUT 3) with expected level of competencies for PM 1 (Project Lead) – a senior PM role - discuss at your table to gain consensus**

**Use the completed skill levels (on this form) for the Manager, Data Analyst and Project Support roles to help you with determining the levels – based on your experience with these or similar roles.**

## Each of Tables 3 and 4: PM2

**Use the Handouts –**

- Handout 1- Representative Competency Behaviours and**
- Handout 2 - Matrix – with all roles**

**COMPLETE THE WORKSHOP MATRIX FORM (HANDOUT 3) with expected level of competencies for PM 2 (Practice Lead) – an intermediate PM role - discuss at your table to gain consensus**

**Use the completed skill levels (on this form) for the Manager, Data Analyst and Project Support roles to help you with determining the levels – based on your experience with these or similar roles**

# Table 5: Competency Review

Use the Handouts –

- Handout 1- Representative Competency Behaviours and
- Handout 2 - Matrix – with all roles

**DISCUSS AND REVIEW** both handouts and **DOCUMENT** what (if any) key skills are missing for the 2 project management roles:

- Senior PM (PM 1) and
- Intermediate PM (PM 2)

# Table 6: Competency Review

**Use the Handouts –**

- Handout 1- Representative Competency Behaviours and**
- Handout 2 - Matrix – with all roles**

**DISCUSS AND REVIEW** both handouts and **DOCUMENT** where you disagree (if you do) with any of the competency levels for PM 1 and PM 2 and why.



# Workshop Recap

Time to complete: 15 min  
2:30 pm

# Tables 1 to 4: Competency Levels

**Did you have trouble agreeing at your table on the expected levels of competency for a PM?**

**What were the skills that were most difficult?**

Table 5: Missing Skills?

Table 6: Expected Competency Levels

# Mentoring

# All

- **Who thinks a tool like this would be helpful in assessing skill levels**
  - **for a PM?**
  - **for other project team members?**
- **Who thinks a tool like this would be helpful in mentoring**
  - **a PM?**
  - **other project team members?**

## Mentoring Discussion (from handout #2)

- **On the last row of the matrix, there are “scores” for each skill level**
- **These scores are the number of roles where the expected competency level is 5 or 6, i.e. there should be a team member at (or above) the skill level and could help to mentor or coach other team members.**
- **It also shows skills where there may be a shortage of internal team members with the ability to help others, (may need a SME to help).**

## Mentoring Discussion (continued)

- **Clearly mentoring is only one of the mechanisms to help staff gain / improve competency.**
- **Technical skills are typically the most easily gained through formal courses / certifications.**
- **The “soft” skills are often the ones that move project teams to a higher level of project maturity. These must be supported and commitments made by the more senior / executive levels of an organization.**

# Mentoring and Coaching

- **Business skills are where project teams gain credibility in the organization.**
- **Often (and particularly in healthcare) the perception is that you must have worked on “the front line” (you must have a clinical background).**
- **Coaching and mentoring might be best done by SMEs. It might help (on a limited basis) to take on some operational tasks (but this requires caution – you cannot become an operational staff member in the long term).**



# Final Questions and Wrap Up

- Remember – a fool with a tool is still a fool.

## Contact Information

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