

# Managing A Successful Project

**ROLES, GOALS AND REPORTING**

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Program Manager

# Objectives

- Understand the Project Directors'/Finance Officers' Role
- Understand the Program Managers' Role
- Identify resources to strategically plan project implementation
- Build value-added Progress Reports
- Learn to use project performance information to drive success



**Project  
Management  
Cycle**

Strategize  
to meet  
goals

Plan  
Activities

Execute  
Activities

Monitor  
and report

Closeout/  
End of  
Year  
Reporting



# PLAN ACTIVITIES

Project Director/Financial Admin	OHSO Program Manager
<ul style="list-style-type: none"> <li>• Project Implementation</li> <li>• Prepare for next reporting period</li> <li>• Project staff/volunteer management</li> </ul>	<ul style="list-style-type: none"> <li>• Strategic support</li> </ul>

# Planning Activities

- Planning criteria
  - Grant agreement
  - Project goal & activity milestones
  - Countermeasures
  - Budget projections
- Managing project staff
  - Project activities
  - Shift Planning
  - Training
- Public Information & Education –  
[www.trafficsafetymarketing.gov](http://www.trafficsafetymarketing.gov)



# EXECUTE ACTIVITIES

Project Director/Financial Admin	OHSO Program Manager
<ul style="list-style-type: none"> <li>• Activity oversight</li> <li>• Timesheets/Activity Report collection and review</li> <li>• Timesheet submission for Payroll</li> <li>• Gather supporting documentation</li> </ul>	

# EXECUTE ACTIVITIES

**Manage the details** so your project is successful. Engage in continuous planning, monitoring and adjusting as needed

- Keep project goal(s) and milestones in mind.
  - Work adequate enforcement **hours**.
- Evidence-based strategy and best practices

# Supporting Documentation

- Activity Sheets (enforcement grants)
  - Days & hours worked
  - Written contacts (warnings/citation)
  - Signatures (Individual and Supervisor)
- Enrollment lists, curricula, agenda, receipts





# MONITOR & REPORT

Project Director/Financial Admin	OHSO Program Manager
<ul style="list-style-type: none"> <li>• Progress Report (PR)</li> <li>• Reimbursement Requests (RFR/RFP)</li> <li>• Ongoing project monitoring</li> <li>• Other award-specific reporting requirements</li> <li>• Continuous monitoring</li> </ul>	<ul style="list-style-type: none"> <li>• Process reports and claims</li> <li>• Strategic support</li> <li>• Technical assistance</li> <li>• Verify internal controls</li> <li>• Periodic monitoring of milestones and finances.</li> </ul>

# REPORTING REQUIREMENTS

## Regular Reporting requirements

- Monthly Progress Report (PR) and Requests for Reimbursement (RFR)
  - Required, even if no activity performed.
  - Reimbursements for funds paid
  - Timely submission supports effective management
    - Due 30 days after the activity within the report has occurred
    - Late reports prevent strategic response
- Contractual reporting requirements
  - Award-specific
- Monitoring Report
  - Required reviews by your OHSO Program Manager

# Progress Reports

# Progress Reports

- A summary of monthly activity
- Milestone progress reporting (based on monthly targets).
- Written contacts summary for enforcement grants
- Narrative Summary



# Section 1: Progress Report Information



## Section 1: Progress Report Information

Check here if you have no activity to report this reporting period

Project Title:

Monthly Report for: June 2020

Report #:

Contract Period: Start Date: Oct 1, 2019  
End Date: Sep 30, 2020

Project Director:

Reporting Period: Start Date: 6/1/2020\*

Program Manager:

End Date: 6/30/2020\*

During this reporting period, the following activity was conducted:

Activity	Project #	Projection	Actual
1 Hours of overtime traffic enforcement/PI&E (based on OT rate of: \$/hour).	PT-20-03-11-10	30.00	66.00
2 Number of traffic stops (target is 2 per hour).	PT-20-03-11-10	60.00	122.00
3 Number of PI&E activities conducted - minimum 2 per month (to include media contacts, traffic safety presentations, etc.).	PT-20-03-11-10	2.00	2.00



If the project includes enforcement activity, complete the following section for **grant funded** activity:

Number of written contacts

Speed Related	DUI/DWI/APC	Occupant Protection	All others	Total
70	0	1	121	192



Narrative Summary

722 of 2000 \*



**Full name**



I, , of lawful age, being first duly sworn, on oath, say that I am, or authorized to submit this report on behalf of, the duly authorized Project Director of the above mentioned grant agreement with the Oklahoma Highway Safety Office; do depose and say that I have full knowledge of this "Project Director's Progress Report;" that said report is, in accordance with the aforementioned grant agreement, true and correct. Affiant further states that he/she has fully complied with all Municipal, State and Federal Laws, Regulations and directives governing grants including, but not limited to, those listed in Parts II and III of the aforementioned grant agreement, to the best of his/her knowledge, information and belief.



Program Manager Comments

# Section 2: Summary of Activity

Section 2 of the progress report summarizes your monthly and year to date activity against the projections. This is a VERY valuable summary for planning and re-strategizing.

## Section 2: Summary of Activity:

### Activity

#	Description	Project #	Monthly Projection	Actual Mo Result	Year to Date Projection	Actual YTD Result
1	Hours of overtime traffic enforcement/PI&E (based on OT rate of \$ /hour).	PT-20-03-11-10	30.00	66.00	270.00	348.75
2	Number of traffic stops (target is 2 per hour).	PT-20-03-11-10	60.00	122.00	540.00	641.00
3	Number of PI&E activities conducted - minimum 2 per month (to include media contacts, traffic safety presentations, etc.).	PT-20-03-11-10	2.00	2.00	18.00	17.00
4	Project Director or designee to attend OHSO Project Director's Training Course.	PT-20-03-11-10			1.00	1.00
5	Submit narrative report on the 2019 Lifesavers Conference with at least two recommendations for improving traffic safety efforts in Oklahoma.	PT-20-03-11-10			1.00	0



# Progress Reports

- Good Narrative Summaries
  - Highlight significant information and successes
  - Explain anomalies

“...XX county experienced widespread flooding, preventing OT enforcement for part of the month.”

- Share non-grant highway safety information

“In addition to 6 DUI arrests by officers working the grant, there were 15 individuals arrested for the month by the Patrol Division.”



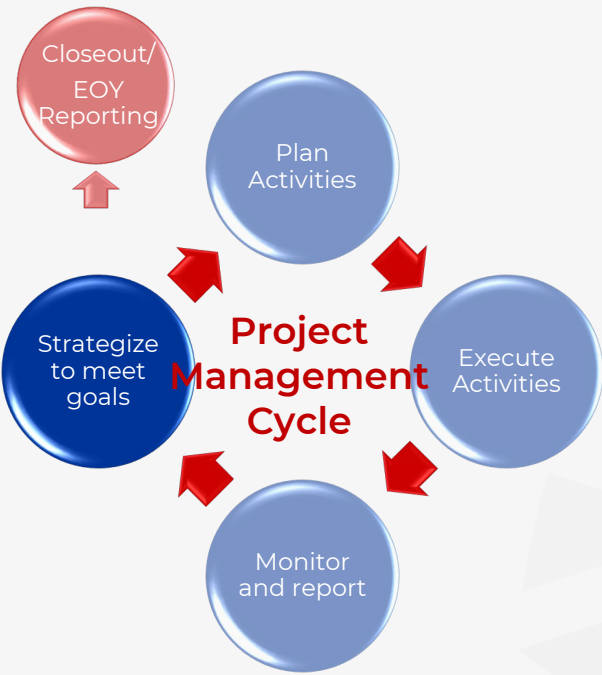
# Progress Reports

- Good Narrative Summaries, continued
  - Share progress not reported in milestones (e.g. pre-planning/contingency)

“Training sessions have been scheduled with XX on the following dates...Once the last two courses are finalized, I’ll communicate the full schedule.”

“Three of our scheduled events were cancelled. Included with this month’s attachments is our contingency plan which takes into consideration CDC guidelines impacting how we can move forward.”

- Inform of changes
  - Contractual payroll, new project staff



# STRATEGIZE

Project Director/Financial Admin	OHSO Program Manager
<ul style="list-style-type: none"> <li>• Change requests</li> <li>• Communicate with Program Manager</li> <li>• Strategize based on data</li> <li>• Strategize based on performance</li> </ul>	<ul style="list-style-type: none"> <li>• Change request support</li> <li>• Monitor progress alignment to goal(s)</li> <li>• Strategic support</li> <li>• Recommendations</li> </ul>

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- The previous slide revisits section 2 of the progress report which auto-populates a comparison of actual and year-to-date data.
- In this example the actual monthly hours exceeded the target, which is ok, in general. If we add the context of the request for reimbursement reports, however, we could paint a different picture. Since this is an enforcement example, it could be that higher ranking officers were working OT shifts and year to date spending is at 80% of the award. This could necessitate a scheduling adjustment.
- If we add to the picture and hypothetically say this report is from June, we find ourselves in a challenging position with a full quarter of activity pending in our 80% spending scenario.
  - Worse yet, if this report was late and wasn't received until September, options become very limited with only 2 weeks left in the fiscal year?
- Your ability as a project director and ours as program managers to respond to and support successful projects depends on accurate and timely reporting, continuous review of the information we have, and communication.

# CLOSEOUT



## Project Director/Financial Admin

- Project Assessment
- Submit End of Year summary

## OHSO Program Manager

- Submit End of Year summary comments

## • End of Year Summary

- Due no later than October 31 & includes info tying project activities to goals & accomplishments.
- If reporting is timely and accurate, closeout becomes very straightforward!

# Keys To Success?

- Communicate
  - With project staff
  - With your financial coordinator
  - With your program manager
- Plan strategically
- Use data


# Knowledge Check

# Who is primarily responsible for ensuring an activity or purchase is allowable?

- Program Manager
- Project Director
- OHSO Finance Manager
- Officers or staff working the shifts



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-   Project Director
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- Officers or staff working the shifts

As a project director, you should review your grant agreement for what activities and expenditures are allowable and communicate that to your staff. Program managers will verify, finalize requests for reimbursement and can provide additional support as needed.

# Which is not a responsibility of the Project Director/Finance Officer?

- Project implementation
- Gathering supporting documentation
- Submit Progress Reports (PR) and Reimbursement Requests (RFR)
- Periodic monitoring

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  Periodic monitoring

Periodic reporting here refers to the program manager's on-site, desk, or virtual monitoring visits. In contrast, project directors and financial admin should engage in ongoing/continuous project monitoring

# In what time frame must monthly reports be submitted?

- When project staff gets around to it
- 45 days after the end of the month
- At the end of the fiscal year
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All reports are due \*monthly\*. Without timely reporting, program managers are unable to do their part of the project management cycle to help ensure the success of the project. Continued late reporting can and will affect your ability to obtain future OHSO grants.

# What types of information should go in your narrative summary?

- Significant information and successes
- Written summary of contacts
- Explanation of anomalies
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Contact numbers are captured in section 1 and do not have to be revisited in the narrative summary.


PII should not be included in reports.

# At what stage in the cycle should you communicate with your financial officer/coordinator?

- Plan activities
- Execute activities
- Monitor and report
- All the above



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- Plan activities
- Execute activities
- Monitor and report
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Communication throughout every stage of project management is critical. Whether your financial admin is in HR, payroll, or administration, stay in constant communication!

# You observe reduced DUI activity on OT shifts, but increased activity on non-grant department activity. What should you do?

- Review local and state data with your PM and consider different shift times.
- Nothing. We'll get them eventually.
- Delay submitting progress reports until the numbers look better.
- Claim the non-grant activity and include it on your report for reimbursement

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Always take action to reach your project goal.  
Timely reporting is important, so avoid delay.  
Claiming non-grant activity for reimbursement is fraudulent!

**If you have questions, please contact your assigned program manager or:**

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405-203-4532**