



Sector Project Managers

Expectations, Challenges & Recommendations for Lead Agencies

Introduction

The role of the Project Manager is essential to the successful functioning of a sector initiative. There are a number of core functions that Project Managers perform and those areas are addressed here. It is important to note that while there are many functions and issues that Project Managers share, the role may vary considerably, depending on the needs of a project and sector in which the work takes place. Characteristics such as project lead, project design, target population and staffing pattern may create variations in the Project Manager role. For example, while some Project Managers may provide more intense participant services, such as case management, career coaching and assessment, others may rely on other staff, partners or vendors to provide these services. That said, responsibility for ensuring that someone is handling those functions competently, does rest on the Project Manager. This paper provides an overview of the basic, common responsibilities of project Managers in sector initiatives, as well as suggestions for lead agencies in preparing for and orienting new Project Managers.

Project Managers managing sector initiatives have four primary responsibilities:

1. Primary liaison between project partners & partnership development
2. Assist in identifying training needs and corresponding outcomes to measure effectiveness of the project, for all constituents
3. Coordinate all grant-related training and career development activities
4. Develop & Implement Tracking & Documentation

1. Primary Liaison Between Project Partners & Partnership Development

Project Managers are the liaison between and among all project partners, including instructors, participants, employer partners, site Managers, managers, unions and state intermediaries. Project Managers need to establish good working relationships early in the project, with an effort to help partners get to know one another.

Convene, facilitate and ensure engagement of partners on a regular basis

In addition to day to day communication and coordination of sector project partners, the Project Manager, in most cases is responsible for overall partnership development including:

- Convening regularly scheduled partnership meetings (notification, agenda, etc)
- Facilitating discussions around common sector training needs
- Providing updates on project barriers, outcomes and progress to assist partners in making necessary adjustments

Partnership meetings offer useful perspective and provide a great opportunity to take stock and see what is working and what is not. The review and preparation for these meetings requires critical reflection on progress and challenges and is an important part of the work of the Project Manager.

Maintain continued contact with all partners

Project Managers, in their role as "troubleshooter," ideally serve as the "point of contact" for all stakeholders/partners in the project so that they are the first to hear of issues and problems that need to be addressed. For example, Project Managers facilitate communication between the instructor and the participants, sometimes addressing issues of tardiness and poor attendance with workers or advocating for students who need to make up class time or exams. The Project Manager also facilitates communication between vendors/training providers/instructors and

employers/sector partners regarding employer and participant (employee or pre-employment) training needs, logistics, enrollment, outcomes, etc.

- **Key Challenge:** Serving as a liaison among all partners can be very challenging. Often the Project Manager is the only person working entirely on the project and s/he may be new to the lead organization. A new Project Manager may need to become familiar with the sector, workforce development issues or the key partners in the initiative. We strongly urge Project Managers to take part in peer networking opportunities offered by Commonwealth Corporation.

Continually work to create and retain buy-in

Getting busy supervisors to buy into the project early is key to success. For incumbent training, without the strong support of leadership and supervisors, class attendance may fall off and student learning can be jeopardized. For pre-employment training, lack of early buy-in and support from leadership and supervisors may cause difficulty in placing individuals successfully at employer partners or may result in creating poor retention rates due to misalignment of training and employer needs. Having union involvement is also key to gain buy-in from employees and supervisors.

- **Key Challenge:** Project Managers may face challenges from various partners, either a lack of buy-in from leadership and supervisors or simply the difficulty of forming new relationships with partners and supervisors. For example, some supervisors of lower-skilled workers fear that if their employees were to participate in training, they will then leave their jobs for other departments or organizations. Project Managers can address this issue by working with partners to develop strategies to assure managers that the needs of the organization come first, identify benefits of well-trained employees and be sure that they are included in all phases of the project. Creating a role for supervisors in sub-committees and other implementation activities will help gain buy-in and support. Some examples of sub-committees that managers may participate in are: curriculum development, career ladders, recruitment and vendor selection.

Specific Recommendations to Lead Agencies

- In addition to becoming familiar with contracts and the grant proposal, a first step for Project Managers should include contacting key project partners and other project staff to introduce him/herself. Establishing good relationships with partners and project staff early on will help establish the framework for a successful partnership and project.
- Projects may want to plan a partnership meeting (coordinated and facilitated by lead) within the first few weeks of the new Project Managers hire date. This will give the Project Manager an opportunity to meet the partners and provide an opportunity for all partners to meet and review the project goals.
- Assist the Project Manager in developing systems to keep all partners updated on project activities and make sure that all partners feel comfortable approaching the Manager with problems as soon as they arise.
- Work with the Project Manager to develop a clear and compelling message about the project, so that it is appropriate for multiple audiences including leadership, supervisors, front-line employees, participants and other partners. Until partners and workers at all levels understand and buy into the project, enrollment and attendance are likely to suffer.
- Plan meetings on site at employer partners and community-based organizations, to be closer to the participants and understand their needs.

2. Assist in identifying training needs and corresponding outcomes to measure effectiveness of the project, for all constituents

Sector initiatives are designed to employer specifications in response to employer-identified needs. Outcome evaluation will measure the attainment of each project's objectives and performance measures and the success of the sector initiative as a whole.

Project Managers are responsible for:

1. Assisting employer partners in identifying gaps in employee job skills and where business change is needed
2. Assisting employer partners in designing the intervention that has been identified through joint discussions with employers and training providers, including training requirements, career development activities and other supports needed.
3. Facilitating employer discussion on business impacts (i.e. how will employers know when change has occurred & how will they/the project measure and document this change?)
4. Developing systems to measure, collect and report data to evaluate and document participant outcomes and business impacts

Many projects may have already conducted a needs analysis and other assessments to determine employer needs, prior to hiring a Project Manager. However, Project Managers should be prepared to assist employers in identifying changing needs. Once implementation of the project has begun, employers may articulate a training need that had not previously been identified as necessary to achieving the desired business impact. The Project Manager needs to be prepared to, with the assistance of the lead and other partners, work with the employer to continue to identify and respond to needs. Ongoing evaluation and continuous improvement will assist the project in accomplishing outcomes and goals. Project Managers, with the assistance of the project lead, also need to be prepared to assist employers in designing training to meet these changing and emerging needs.

Assisting employers in identifying business impacts and establishing the performance measures to assess whether and to what extent issues are being addressed, is critical to success. Project Managers are charged with ensuring that business impacts and key indicators are clearly defined and are reported on, as required by terms of the grant.

Specific Recommendations to Lead Agencies

- Provide the Project Manager with a copy of all needs analysis and assessments that were conducted for preparation of the project design, including applications, papers and plans developed. This information will help him/her understand the basis and framework for the training design. This will also assist them in reviewing progress and monitoring the business impact of the project.
- Be responsive to changing needs of partners and participants
- Encourage Project Managers to maintain contact with other sector initiatives in the region and statewide. If your initiative is funded through a grant, ask your funding source what technical assistance is available through them and what resource they can provide.
- Encourage Project Managers to maintain contact with, and reach out for technical assistance through funding source.

- Utilize web resources focused on sector initiatives
- Recommend that Project Managers read and make use of the Commonwealth Corporation's "Business Impact Primer: Speaking the Language of Employers," available from Commonwealth Corporation. To order copies email Caroline Kirton at ckirton@commcorp.org

3. Coordinate all grant-related training and career development activities

Project Managers are responsible for helping develop and overseeing implementation of all grant related training and career development activities. In order to plan and coordinate these activities successfully, it is vital that the Project Manager understand the contract and expectations of the project, despite the fact that the Project Manager may not have been part of the proposal or planning stages. With this said, it may be difficult for the Project Manager to interpret the grant proposal and understand how to implement the project without this assistance for the project lead.

Scheduling, logistics, ongoing review and troubleshooting of training

Many Project Managers are often surprised by the challenge of adhering to the planned timeline for trainings outlined in the proposal because of the sheer amount of work required before training can start. Project Managers need to establish training courses that accommodate the needs of employers, participants, and other partners, while communicating and coordinating the schedule and logistics with the training providers or individual instructors. Once the training is up and running, the Project Manager must ensure that the training is running successfully and that they deal immediately with any issues or concerns that may arise. These issues may involve lack of attendance, instruction quality or content, individual participant schedule or educational needs, and a variety of other "surprises." The ability of the Project Manager to identify potential issues, communicate with partners to develop a strategy and make the necessary adjustments is critical to the success of the project

- **Key Challenge:** Finding the best time to schedule training, as well as available facilities can be difficult. There are numerous factors that contribute to the difficulty in scheduling courses, including varying schedules of participants, supervisors and training providers. Involving key partner personnel, including those who schedule shift coverage, will help with this responsibility.

Promotion

The Project Manager takes a leadership role in convening a team of partners to develop and implement a promotion strategy. A strong promotion team may include staff from employer sites, unions, career centers and community-based organizations. Unions are key to getting the word out, and act as cheerleaders for the program. This promotion work requires good relationships, open communication lines, and effective marketing strategies. An effective marketing strategy involves feedback from stakeholders that understand the target population. Projects should consider tapping into existing vehicles for recruitment, including providing information at department or staff meetings, including information in paychecks and employee newsletters.

In addition to promoting specific training courses to potential participants, Project Managers also need to build support for the project among partners, so that employees will be motivated and able to participate. The Project Manager's task is to develop a clear message about the sector initiative project, its goal, and its value to participants, supervisor, employers and the sector as a whole. Lead organizations will need to repeat this message many times and to many different

audiences, including to project partners, to ensure that everyone fully understands the project's goals and requirements.

- **Key Challenge:** Sometimes Project Managers are based off-site or at a partner agency not directly providing services; this increases the challenge of promoting the project. Project Managers will need to rely on both formal and informal site Managers to help communicate the project's message at various employer and other partners.

Recruitment, assessment, selection, enrollment & participant support

One of the most concrete functions of Project Managers is to enroll employees in training and educational programs. Implementing effective promotion and marketing strategies to publicize and gain buy-in for the training courses, as well as scheduling and offering appropriate training to meet both employer and participants need, as discussed above, will help lead to successful recruitment.

Given that, in many cases individuals are being referred from a variety of sources and employers, Project Managers will need to develop processes, along with all partners, to plan a fair and effective enrollment process. Eligibility, assessment requirements and selection processes need to be determined and agreed upon in advance. Project Managers are also charged with troubleshooting course enrollment, including "drumming up business" for courses by conducting additional partner and participant outreach efforts to increase enrollment, as well as identifying and communicating to partners, the potential causes for the low enrollment.

- **Key Challenge:** It is often challenging to meet targets for employee enrollment in training because of the extent of employee skill deficits and needs. English language proficiency and basic academic abilities may fall below the expectations of those who crafted the proposal and project. Employees themselves may not know their own academic limitations until they are assessed. Sometimes, the planned training may not be appropriate for the educational levels of many of the employees. It may be difficult to accommodate the many different educational levels and needs of employees in a single course or training.

Develop and hold vendors accountable to contract specifications

Many projects will collaborate with training providers and project partners to provide necessary training and career development supports for participants. This may include development and instruction of training courses, assessment, career coaching, job placement and case management. It is critical that project leads and Project Managers understand that even though a partner or vendor is providing a service, it is still the responsibility of the lead and Project Manager to ensure that vendors are held accountable and are delivering services appropriately, to ensure the overall outcomes and success of the project. The Project Manager is charged with developing systems to establish vendor specifications and to monitor performance of all vendors providing services through this grant.

- **Key Challenge:** Many times formal agreements or contracts are not established between leads and various partners/vendors providing services. This is very challenging for a Project Manager, creating uncertainty of what the actual services are (time, duration, number to be served, etc) and leaving them with out backup to hold vendors accountable. These items need to be explicitly outlined and agreed upon for accountability.

Oversee the development and implementation of integrated curricula

Many projects have identified customized curriculum as a need for their project. Though a Project Manager may be relying on a consultant or training vendor to develop this curriculum, it is the responsibility of the Project Manager to ensure a clear timeline has been developed and is adhered to. Since the development of curriculum delays the actual training of participants, it is important that this process be done efficiently and in accordance with the project timeline.

Project Managers are also responsible for ensuring the integration of employer and other partner needs into the development of the curriculum. Curriculum development committees and focus groups can be used to establish clear learning objectives. These should be determined prior to the development of the curriculum. All partners should have the opportunity to review and provide feedback on the curriculum, (learning objectives, etc.), to ensure it meets the employer and sectors needs.

Assist organizations in designing and implementing strategies to assure transfer of learning by trainees on the job

Not only are Project Managers charged with overseeing the day to day training and career development activities, they should be prepared to assist in ensuring the transfer of learning from the training courses to on the job functions. Potential ways that Project Managers can integrate this into the project design include:

- Be sure that training is being designed in response to the specific outcomes (behavioral changes, new or improved processes, etc.) identified by employer partner(s) and that new skills are built into the jobs that participants will be doing after training.
- The use of departmental forums for classroom instruction helps students learn in context and increase flow of information across levels in the facility.
- Be sure that training providers understand the needs and culture of the workplace and the workforce. Work with employers and training providers to help design training that is integrated into the workplace and possibly set up courses in the work setting, where feasible.
- Integrate supervisor training and overviews into the training design, to ensure supervisors are clear on the skills employees will learn through the training and how to support them during and after the period of training. Additionally, supervisors could be asked to develop goals based on the curriculum overview and connect these to the job responsibilities. Therefore, the training that participants receive will be implemented and not forgotten.

Specific Recommendations to Lead Agencies

- Assisting Project Managers in developing open communication that supports feedback and allows modification, to accommodate feedback, is the key to keeping Managers "in the loop."
- Assist Project Managers in developing subcontracts and clear Memorandum of Agreements with all partners or vendors providing services under this project.
- Provide any initial needs assessment, most likely conducted during the proposal stage, to Project Managers. Understanding the target population intended to be served through this project will help to develop appropriate marketing strategies.
- Build into the training design activities and strategies to ensure the transfer of learning.
- Encourage open communication and assist in problem solving

4. Develop & Implement Tracking & Documentation

Project Managers must always have a handle on the current status of the project. In addition to meeting the requirements of Commonwealth Corporation (budgetary, project results, data entry, etc), Project Managers will also need to report project status to the lead organization, employer partners and other project partners on an on-going basis. This information will be the foundation to determine modifications in the training design, the need for additional supports and the success toward which the intervention is working. Keep in mind that although this project is usually the Managers primary responsibility, it is only one piece of the responsibilities of the employers, supervisors and other partners. Try to design reporting processes to accommodate the needs and schedule of project partners-this will increase the level of response from partners.

Specific Recommendations to Lead Agencies

- Work with the Project Manager to develop clear processes and expectations of partners for reporting project data and information. This may include the development of reporting templates, setting deadlines, and establishing protocol for non-responsive partners.
- Provide ongoing support for the Project Manager, ensuring that information is being reported to them in a timely manner. Many times a lead organization may need to step in to speak with other project partners on the importance of this information and to remind partners of their expectations.

5. General Recommendations

- First steps for Project Managers invariably require becoming familiar with contracts, the grant proposal and contacting key project partners.
- Organization is crucial! Dealing with many people's schedules, planning course offerings to maximize potential enrollment, and communicating with many partners requires excellent organization and work habits. Finding a Project Manager with strong organizational skills is critical to the success of the project
- Many lead organizations have been involved with similar sector initiatives in the past. Provide the new Project Manager with access to the resources you may have including computer files, documents and templates created in the past and any other resources that may provide some insights as to what has and has not worked in the past.
- Encourage Project Managers to get to know other Project Managers, through quarterly meetings, peer networking opportunities, or a mentoring relationship to share problems and solutions and receive support.
- Encourage Project Managers to use meetings with other Project Managers and the technical support offered by statewide intermediaries or granting agencies to gain new insights and jointly problem-solve.

