

# Project Management: Completion Criteria

UNC Network for Research Professionals

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# Topics

- ▶ Introduction
- ▶ Project management terminology and concepts
- ▶ Expectations Management
- ▶ Completion Criteria - Defining Done



# What is a Project?

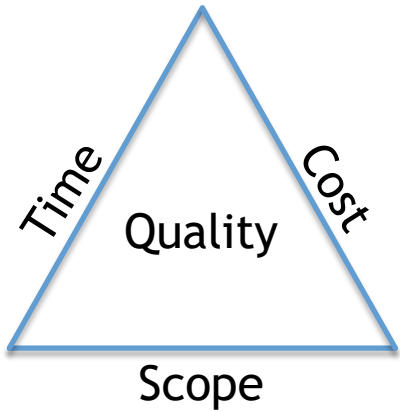
## Key attributes:

- ▶ Temporary endeavor
- ▶ With a defined beginning and end
- ▶ To achieve unique goals and objectives
  
- ▶ may involve cross organization or cross functional teams
- ▶ restricted by Triple Constraints - time, cost, scope objectives

## In contrast to Operations

- ▶ Work done every day
- ▶ Generally routine and repetitive

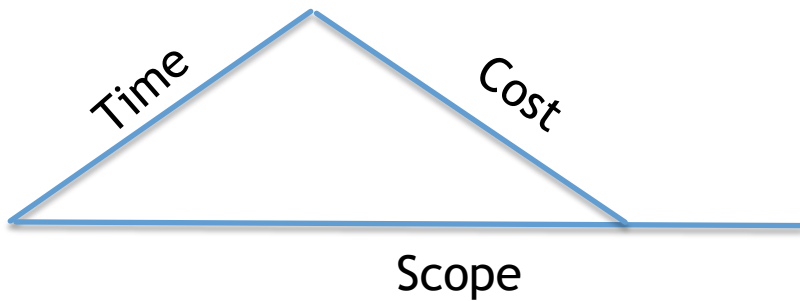
# Triple Constraints



The attributes, usually in opposition, that a project manager must manage to successfully complete a project.

The Scope - the activities, the work that will be done to complete the project.

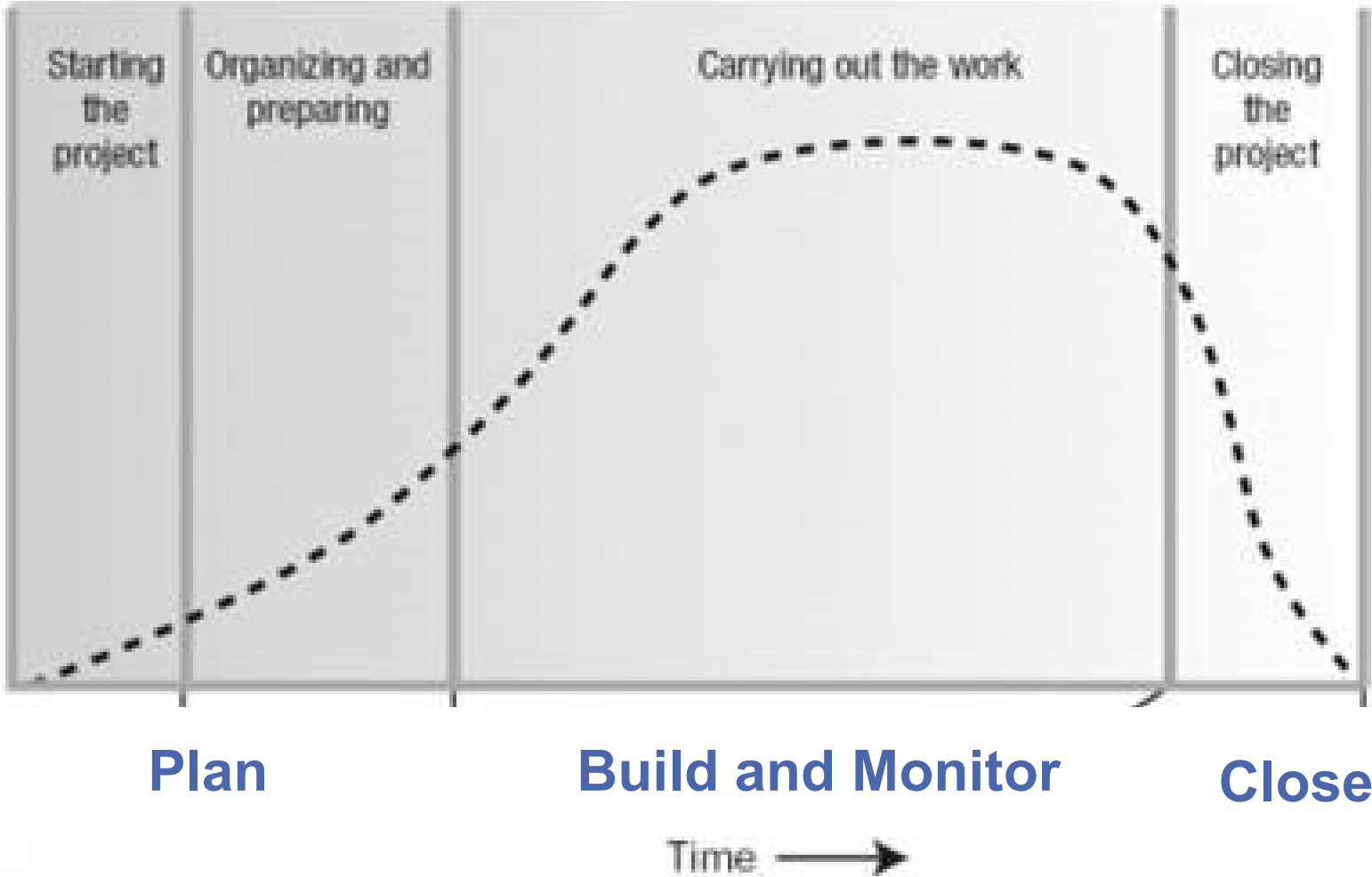
**Time, Cost and Scope - need to be in equilibrium to result in success.**



Scope Creep - when stakeholders ask for additional scope, without negotiating corresponding time and cost. **Scope creep throws the project out of equilibrium.**

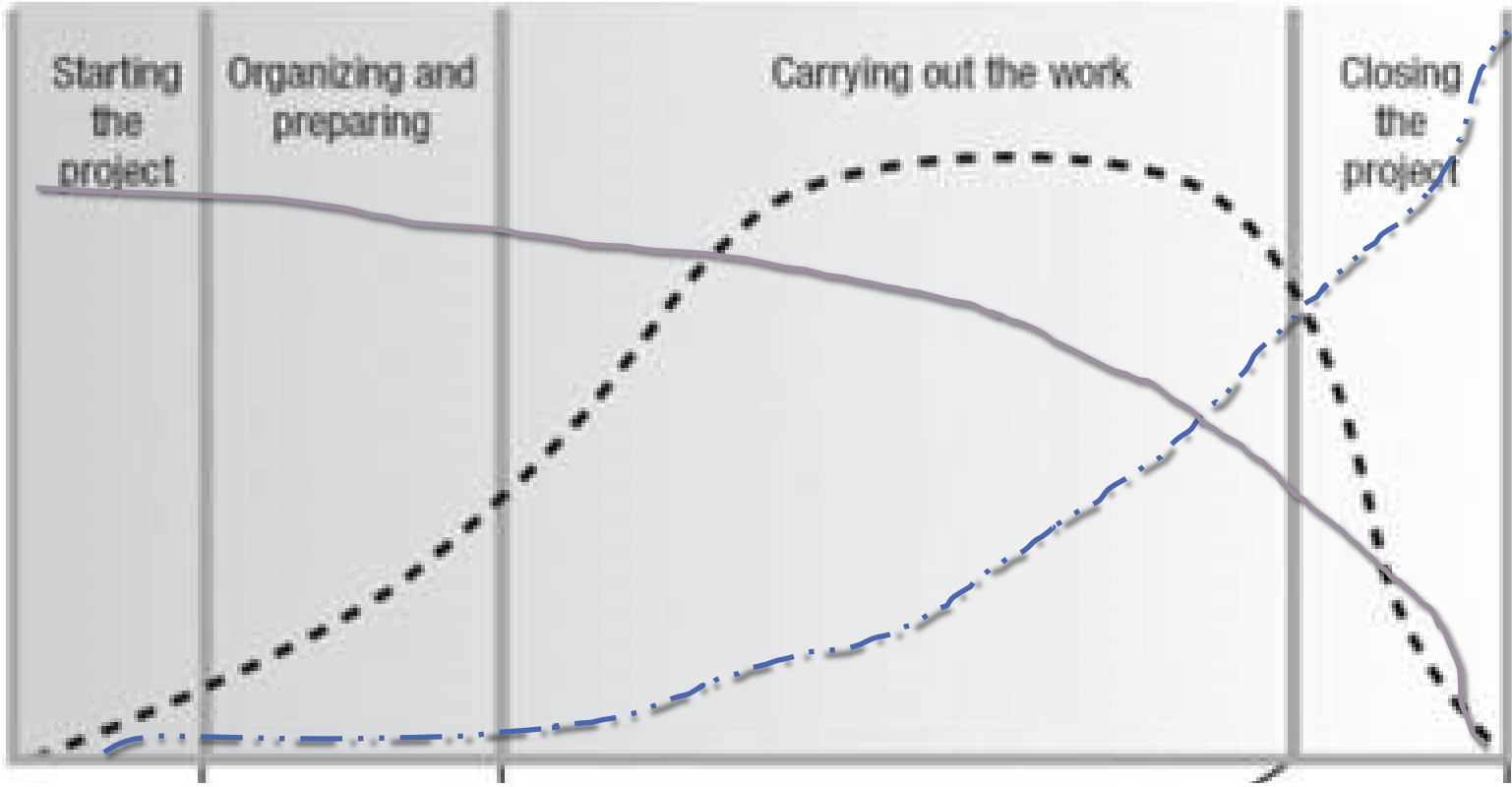
Project managers manage expectations by managing the triple constraints.

# Project lifecycle



# What changes over a project lifecycle?

LOE ----  
Cost of changes - . . . . .  
Ability to influence \_\_\_\_\_



← Plan and →  
Site Startup

Conduct Trial:  
Monitor Sites, Analyze  
the Data

Close  
out

# Expectations Management

Oxford Dictionaries defines **Manage Expectations** as

“Seek to prevent disappointment by establishing in advance what can realistically be achieved or delivered by a project, undertaking, course of action, etc.”

# Deliverables

A **deliverable** is a tangible or intangible good or service produced as a result of a project that is intended to be delivered to a customer (either internal or external).

A **deliverable** could be a progress report, a chart review summary, a software product, a server upgrade or any other building block of an overall project.

A **deliverable** may be composed of multiple smaller deliverables



# Completion Criteria

- ▶ Define ‘done’
  - ▶ The conditions that a deliverable must satisfy to be accepted by a user or customer
  - ▶ Avoid ‘squishy’ criteria such as “Easy to use”, “sufficient” “complete” – without including concrete descriptions to explain what these mean.

# Completion Criteria - Documentation of Informed Consent

- ▶ Documentation of Informed Consent will be considered complete when:
  - ▶ The correct version of the Informed Consent Form has been used
  - ▶ The Signature and Date Signed are included on the form
  - ▶ Cover sheet of attestations is complete with all required signatures,
    - ▶ The attestation of review is included
    - ▶ The attestation that questions have been answered is included
  - ▶ The screening history is documented
  - ▶ SOP for electronic consent has been followed

# Completion Criteria - Serious Adverse Event Report

- ▶ Serious Adverse Event Report will be considered complete when:
  - ▶ The event is classified as to severity, expectedness, relatedness
  - ▶ The report was submitted within the required timeframe for the trial
  - ▶ The event is recorded in both the source data (commonly medical notes) and the adverse event log
  - ▶ The event report complies with the protocols established for the trial
  - ▶ The outcome of the event is documented to demonstrate it has been followed to its resolution

# Completion Criteria - Project Closeout

What are some completion criteria for Project Closeout?

Project closeout is considered complete when the sponsor has been invoiced for all expenses per the contract.

Others?

# THANK YOU!

