Where are the Project Status Reports? Applying Needs Assessment in the workplace

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Tales from the Field, a monthly column, consists of reports of evidence-based performance improvement practice and advice, presented by graduate students, alumni, and faculty of Boise State University's Instructional and Performance Technology department.

A New Project Management Process

In September of 2008, the client implemented a new Project Management Process following a one day training event. The Project Officers (POs) were advised that each project assigned to them would include a project charter, a project plan, bi-weekly project status reports, and a final project report. From September 2008 to January 2009, only two of the seven POs completed all the project status reports as required. In January 2009, a group of Boise State University students were asked to conduct a needs assessment to determine the barriers to completion of the project status reports and offer recommendations on how to improve the POs' performance.

Is There a Performance Problem?

The desired performance is a monthly report by each PO updating the status of each of their projects. With only two of seven POs reporting consistently, the potential for improving performance (Gilbert, 2007) was measured at 2.17 (PIP = $W_{exemplary}/W_{typical}$).

Data Collection and Analysis

Data gathering consisted of quantitative and qualitative data from archival sources, interviews, electronic surveys, and a literature review. With forethought being given to analysis, Chevalier's (2007) cause analysis worksheet was used as a template for survey questions. This worksheet, with origins in Gilbert's (2007) Behavioral Engineering Model (BEM) and Lewin's (1947) force field analysis, utilizes the six environmental and personal factors with behavioral subcategories. As an example, adapted questions for the BEM's Information factor are shown in Table 1.

INFORMATION	
Clear expectations	1a. Expectations for the project status reporting process are clear.
Relevant feedback	1b. Feedback given to me on my project status reports is timely.
	1c. I receive feedback on my project status reports for *good* performance.
	1d. I receive feedback on my project status reports for *not so good* performance.
	1e. Feedback I have received on my performance on my project status reports is relevant.
Relevant guides/job aids	1f. The handout (containing job aids, templates, and examples) for project status reporting is useful.
Performance coaching	1g. I receive coaching regarding the quality of my performance on project status reports.
Purpose/use of the reports	1h. I understand how my project status reports will be used by others.

Table 1. Adapted BEM Information Questions.

Evaluation Results and Recommendations

The analysis revealed five main variables impacting the performance of the POs in relation to the project status reporting requirement:

1. no timely and relevant feedback on project status reporting performance;
2. no incentives linked to project status reporting performance;
3. no consequences linked to non-performance;
4. no information regarding how the project status reports fit into the big picture; and
5. the POs' pressure on management to reduce reporting frequency.

Based on the analysis, the project team provided recommendations for the BEM factors of Information, Incentives, and Motives. All of the recommendations fall in the organizational level of the Synchronized Analysis Model (Marker, 2007), indicating that changes should be implemented at the organizational level.

Information:

- provide timely and relevant feedback for both good and not so good project status reports; and
- explain how the reports will be used by everyone in the organization, the purpose of the reports, and the systemic impact of the reports.

Incentives:

- provide incentives for POs who complete project status reports correctly and on time, which might include public and private recognition; and
- provide consequences for POs who do not complete project status reports correctly and on time.

Motivation (can be influenced by a data intervention):

- help POs see how the completion of the project status reports ties into the bigger picture for the organization;
- help POs understand how completing project status reports relates to the rest of their job and can lead to career opportunities;
- help POs understand how the completion of the project status reports helps them successfully, effectively, and efficiently complete the project; and
- help POs understand that reporting "bad news" in the project status reports isn't a bad thing and that it actually has benefits (i.e., reporting that the project won't be completed on time isn't a bad thing, but is beneficial because others can plan different projects and events based on that information).

Advice for Practitioners Conducting Needs Assessment

Each phase of the project provided valuable lessons on the conduct of needs assessment, the most important of which are summarized below.

- ***Planning -*** Allocate extra time for survey research, design, and development. Build flexibility into schedules for conducting interviews to accommodate the schedules of the interviewees.

- ***Interviews -*** Practice the interview beforehand. Consider developing additional probing questions and identify strategies to bring the interviewee back on topic.

- ***Surveys -*** Use HPT models such as Gilbert's (2007) BEM, Rossett's (1999) Problem Performance Analysis, and Chevalier's (2007) Performance Analysis Worksheet as guides to frame survey questions and ensure all factors that may contribute to the performance problem are examined. Pilot test your surveys!

- ***Data Analysis -*** Using HPT models to guide the analysis helps to categorize and visualize the potential factors contributing to performance problems.

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