

STATEMENTS

A Project Management Approach to an ACPE Accreditation Self-study

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In preparation for an on-site evaluation and accreditation by the American Council on Pharmaceutical Education (ACPE), the Albany College of Pharmacy employed project management techniques to complete a comprehensive self-study. A project lifecycle approach, including planning, production, and turnover phases, was used by the project's Self-Study Steering Committee. This approach, with minimal disruption to college operations, resulted in the completion of the self-study process on schedule. Throughout the project, the Steering Committee maintained a log of functions that either were executed successfully or in hindsight, could have been improved. To assess the effectiveness of the project management approach to the self-study process, feedback was obtained from the College community through a poststudy survey. This feedback, coupled with the Steering Committee's data on possible improvements, form the basis for the lessons learned during this self-study process.

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INTRODUCTION

An institutional self-study provides an opportunity for introspection and process improvement. Unfortunately, the self-study process is rarely undertaken for reasons other than institutional accreditation. Given the usual length of accreditation time periods, self-studies are typically undertaken only once every 3 to 5 years. Our paper does not speak to the benefits a college accrues by undertaking a self-study. Rather, it focuses on how project management techniques can be employed to minimize the potentially negative impact undertaking a self-study can have on the day-to-day operations of the college.

Members of the Self-Study Steering Committee at Albany College of Pharmacy employed project management techniques to create a comprehensive self-study report that reflected the viewpoints of all stakeholders. While some aspects of this project were similar to the design of previous efforts (management by a steering committee and subcommittees), this effort included the use of such classic project management techniques as defining project expectations at the beginning of the project and use of a project timeline. The project management tools enabled the Committee to easily manage the process so that more time and attention could be devoted to the

self-study. The self-study experience left the College with an enhanced understanding of our institution and its strengths and challenges.

A review of project management literature provided many examples of classic application of the science. The following subset of those findings provides insight into traditional project management approaches.

Projects are activities that possess unique characteristics. Loo defines projects as unique, time-limited, complex, and integrated sets of activities with little margin for error.¹ Gilbreath defines projects as temporary pulses of activity yielding a unique, singular result. Whereas day-to-day operations are based on existing systems and processes, projects are one-time only configurations of staff, resources, and management expectations. Given the unique and temporary characteristics of a project, it is important to correctly execute a project from inception to completion. To do so, one must apply project management techniques.²

In the "systems approach" described by Morris,³ a project may be broken down into subsystems, assemblages of people, information, or organization required to achieve a defined objective. If a system is properly organized and managed, it will perform in a manner greater than the sum of its parts. Implicit in the view of projects as systems is the need for clearly organized objectives, recognition that projects are in constant change, and definition and management of major subsystems and interfaces. Morris further describes projects as having a lifecycle:

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prefeasibility/feasibility, design, production, and turn-over/start-up. As a project progresses through these phases, there is a gradual buildup of project activity with a full-scale implementation involving a large number of people. Then as work is completed and the project winds down, there is a phasing out of staff member involvement and effort. While the successful completion of each phase of the project lifecycle is essential for the success of subsequent phases, the work of the design phase is critical to the success of the project, as it lays the groundwork for the production phase. Throughout each of these 4 phases, a project team must be able to quickly respond to changing conditions in the organization's internal or external environment.

It is critically important to clearly define project success. Stakeholders of a project will use different criteria to assess the performance of a project. The viewpoints of top management, project managers, project participants, and observers who were not involved in a project will differ as each group has its own perspective. Rarely would a project fulfill the performance expectations of all involved groups. Bryde has identified key performance indicators of a project such as meeting project objectives, responsiveness to change, smoothness of handover, growth of individuals, and level of disruption to an organization. To assess project success, project managers should align or integrate the perspectives of different project stakeholders.⁴

SELF-STUDY PROJECT

The American Association of Colleges of Pharmacy's (AACP's) self-study project began in May 2003 and culminated in a site visit by representatives of the ACPE in September 2004. As demonstrated in Figure 1, a self-study meets the technical definition of a project as it has a clear lifecycle, integrated sets of activities, is technically complex, and has a clearly specified and limited goal or objective. The completion of this self-study project conforms to Morris' 4 phases of a project's lifecycle. Each of our project's phases, with a description of activities, appears in Figure 1. As the Table indicates, the feasibility phase of the project was actually accomplished by ACPE, through its definition of standards and guidelines for a self-study project. The design, production, and turn-over phases were completed at the Albany College of Pharmacy.

As noted earlier, special attention to the design phase is warranted. The Steering Committee committed a significant amount of time to this planning phase, which resulted in a strong framework for the project as it progressed through subsequent phases. Once the Committee was seated by the Dean, the group established a meeting

schedule for the first 6 months of the project. Subsequent revisions were made to the meeting schedule with semester changes. Establishing this schedule in advance enabled members to schedule other activities accordingly and ensured that meetings for the self-study would take place on a regular basis. The group met at least once a week throughout the project so that all members could stay informed in terms of project status in a timely and efficient manner.

With the meeting schedule in place and a project charter to serve as a guide, the Steering Committee began laying the foundation for the self-study project and subsequent report. This involved a number of separate steps including establishing the administration's support, defining the self-study report structure, creating subcommittees, setting an outline for the self-study report, establishing a project timeline, and defining roles for top-level administration, Steering Committee members, and subcommittee chairs.

Once the chapters for the self-study report were identified, the Steering Committee began the task of identifying subcommittee chairs and members through an extensive deliberative process. Each subcommittee was charged with writing its assigned chapters. The subcommittee chairperson and members were drawn from the administration, full-time faculty members, adjunct faculty members, students, staff members, and alumni of the College. Sixty-four individuals were selected, with consideration of representation of all academic and administrative departments, length of service, tenure status, subject matter expertise, and alumni. Deliberate inclusion of representatives from all stakeholder groups allowed for diversity in perspective in the self-study report and increased collective ownership of the process and final document. The Steering Committee selected potential subcommittee chairs in terms of their knowledge about a chapter's topic and their organizational skills. In order to maintain a level of objectivity in the self-study report, it was decided that subcommittee chairs should not be individuals who held primary organizational responsibility for a function described in a chapter. For example, a member of the library staff worked on the library chapter, but was not the chair for the chapter's subcommittee. However, it was desirable for the subcommittee chairs to have some knowledge about the topic and be objective and insightful when leading their subcommittee members through due diligence and the drafting of chapters.

A detailed project timeline was used to manage this project. A timeline for the project was constructed using a project management software tool, Microsoft *Project* (Microsoft Corporation, Redmond, Wash). This tool

Project Phase	Feasibility	Design	Production	Turn Over
Timeline	Pre-2003	May 2003-Sept 2003	Sept 2003-April 2004	April 2004-Sept 2004
Goal of phase	ACPE develops standards and guidelines for colleges to follow in the creation of self study document. ⁵	College designs a self study document and plan for its creation.	College executes plan for creation of self study.	College endorses self study document. College and ACPE work jointly to arrange site visit.
Tasks completed during ACP's self study process	<p>ACPE activities</p> <ul style="list-style-type: none"> • Notification sent to President and Dean of impending re-evaluation period • Instructions provided for self-study process, including Self-Study Guide 	<p>Steering Committee Formation</p> <ul style="list-style-type: none"> • Members selected to represent a cross-section of college community • Meeting schedule set for length of project <p>Task Definition/Delegation</p> <ul style="list-style-type: none"> • Established administration's support • Project charter created • Detailed project timeline with task assignments created • Selected subcommittee chairs and staffed subcommittees <p>Document Design</p> <ul style="list-style-type: none"> • Defined the structure of the self-study report • Creation of new standards for research and IT • Created chapter templates • Created "mock" chapter as an example for use by subcommittees 	<p>Initial Drafts</p> <ul style="list-style-type: none"> • 2 ½ months dedicated to subcommittee drafting process • Subcommittee chapter outlines submitted to Steering Committee for approval before detailed writing began • Cycle of drafts and review by Steering Committee and administration culminated in "final" draft <p>Community Review</p> <ul style="list-style-type: none"> • Two sets of community hearings were held on the draft document • Steering Committee edited document on the basis of community comments • Final report delivered to College President 	<p>Stakeholder Endorsement</p> <ul style="list-style-type: none"> • Endorsement of the process and document by all participating groups (administration, alumni, faculty, staff and students and Board of Trustees) <p>On-Site Visit Planning</p> <ul style="list-style-type: none"> • In-depth logistical planning for all aspects of visit

Figure 1. Life-cycle of a Self-Study Conducted by the Albany College of Pharmacy.

enables work to be broken into tasks and subtasks. Dates for completion of each task or subtask were established by working from the projected date of the onsite visit, and establishing a schedule in reverse from the onsite visit date. "Working backwards" forces project managers to not only think about how much time is needed for a project, but also fosters the identification of critical project points and critical paths. The use of this tool enabled the Steering Committee to set a project schedule that allowed for the inclusion of project evaluation points, such the submission of an outline before chapter construction and the review of 3 chapter drafts before the open hearing process. Early problem detection was key in the Committee's ability to complete this project on time. The timeline included details of responsible parties and percent of work achieved to date for each task and subtask. The timeline was reviewed at each weekly meeting of the Steering Committee. This review enabled the Steering Committee to record progress and to add additional tasks as necessary. Also, this timeline was shared with the College community (faculty members, students, staff, and administration) at key points in the self-study project.

An example of how appropriate planning improved the quality of the self-study can be found in the Steering Committee's creation of separate standards for the sections on research and information technology. The need to include these standards, which addressed areas of special concern at the College, was identified through the planning or design phase. As the Steering Committee mapped the ACPE standards and guidelines to the various components of the College's operation, it was determined that the research and information technology functions were not sufficiently detailed in the ACPE standards or guidelines to meet our self-study needs. Since the assessment of these 2 functions were important to the College, the Steering Committee adopted a set of standards for each function and included an assessment of performance against these standards in the self-study report.

"Appropriate planning" should not be confused with "inflexibility." There were many instances where additions or deletions to the original report design were made. One such instance occurred when the subcommittees submitted their final drafts to the Steering Committee. Subcommittees were provided with a significant

level of autonomy in their creation of report chapters. Although the subcommittees relied heavily on data to support their findings, a fair amount of opinion was present in the chapter drafts. The Steering Committee, responsible for the final editing of the report, needed to determine whether opinions being reported in the self-study chapters were widely held or were only the perceptions of those authoring the document. The creation of a faculty survey midway through the self-study process was used to make this determination. The results of this survey were used to evaluate the opinions reflected in the document. If there was strong evidence that a particular viewpoint was held by the majority of survey respondents, the viewpoint was retained in the self-study report.

EVALUATION OF THE PROCESS

A clear indication of the successful use of project management techniques during the self-study was that the project was on schedule through every stage of its lifecycle. This was a considerable accomplishment considering that the project required the coordination of the activities of over 60 people from a multitude of internal and external constituent groups. To validate this measure of successful project management, the Committee employed 2 other methods for assessing the project's success: a performance log and a post-activity survey.

Throughout the life of this project, the project management team maintained a log titled "what went right, what went wrong." The purpose of this log was to record strategies that proved to be effective and to note areas for process improvement. In spite of its success, the team was aware that the project could have been improved in a number of ways.

A prominent role for college administration is necessary for a successful project. The placement of a representative from upper administration on the Steering Committee would have helped the project management team with the enforcement of guidelines and schedules and provided additional insight. This person could have also played an invaluable role in resolving personnel issues that were out of the control of the Steering Committee.

One of the strengths of this self-study project was the frequent communication among Steering Committee members and to the College community at large. Our project team initiated meetings with members of Administration. This strength could be improved further by the establishment of a schedule of status meetings between the Steering Committee and Administration. This sched-

ule should be established at the very beginning and run throughout the lifecycle of the project.

We also recommend that the project team meet on a regular basis with academic department chairs and leaders of staff functional units throughout the project. These meetings would serve more than one purpose. First, the meetings would provide an update of the project status to these key functional leaders. Also, project team management could apprise functional leaders of the efforts of their staff and notify them of performance issues.

After the self-study and on-site evaluation visit were completed, the Steering Committee surveyed the College Community to obtain feedback about the self-study process and on how well project management techniques were employed. Survey questions were developed using Bryde's key performance indicators as a framework.⁴ A two-part survey was utilized for this assessment. Questions in the first part of the survey were available to all members of the college community and dealt with the comprehensive nature of the final self-study report, how well the College community was informed about the project and project status, opportunities provided to individuals for input, and the pace of the project. Of the 105 individuals in the College community who could have completed the first part of the survey, 34 (32%) individuals responded. Of those who responded, 80% stated that the report was comprehensive in terms of the identification of the College's strengths and weaknesses. There was also agreement that the project was conducted with minimal disruption to everyday activities (68%), the College community was well informed as to project status (82%), there was ample opportunity to provide input (82%), and there was sufficient allocation of time for the project (71%).

The second part of the survey instrument contained questions that were to be answered by only those who had worked on the project and were tailored to the perspective of a project participant. Questions dealt with the pace of the project and how the project provided opportunity for professional development and growth. Of the 41 individuals who could have responded to the second part of the survey, 19 (46%) individuals responded. Respondents agreed that the project pace was appropriate (84%), and that the project had provided them with a greater understanding of the ACPE (60%), College operations (63%), and the importance of project teamwork (58%). Lastly, 58% agreed that they would willingly be involved in a working group for a future self-study.

Aside from accreditation self-studies, project management may be applied in other ways. Institutions routinely are faced with other projects that require extensive coordination and involvement of a significant number of

people. Examples of projects that could benefit from a project management approach include the review and implementation of the new ACPE accreditation standards and guidelines, curriculum review projects, and the development of new degree programs.

CONCLUSION

A self-study is a time and labor intensive process. Project management techniques, beginning with attention paid to careful planning, can be employed to optimize the efficiency, effectiveness, and benefits of the self-study process. The project management approach is invaluable for the execution of complex projects that involve a large number of participants and require careful coordination of activity. This is especially true for self-studies which, by their nature, involve many individuals from a variety of constituent groups. Most, if not all, of these individuals will be expected to maintain their day-to-day responsibilities in addition to their participation in the development

of a comprehensive, reflective, and accurate assessment of the organization in which they work.

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