

THE COLLECTIVE

Knoxville, TN

More than Lists: Project Management Tools and Tips

February 19, 2015, 1-2:30 PM

Hilton Salon E

Presenter(s)/Moderator(s)

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Brief Description/Abstract from Program

Libraries and archives manage a constant stream of projects and for each, they must make decisions about scope, milestones, deliverables, and more. Come learn from and work with other participants on project planning skills. Specific topics may include project charters, stakeholders, planning templates, and important "soft" skills for project managers.

Estimated Attendance at the Session: 27

NOTES FOR SESSION

-Will use documents from Dropbox: project charter and stakeholder identification

-People in the room described their projects

--themes: emotional baggage, budget/funding, politics, managing cross-unit teams

-Project management definition: time-bound with deliverables; cross-functional teams with new partnerships; new, many, diverse stakeholders; sometimes more responsibility with less authority

-Project manager definition: person responsible for budget. May also spend budget and assign resources to achieve goals. The buck stops with the project manager. Takes the blame but shares the credit. Also, "project coordinator" may assign resources but not funds. Also, "project expeditor" = reports and authorizes project progress without authority to assign resources or spend funds.

-Other project roles: stakeholder; senior manager (authorizes PM, prioritizes projects, resolves conflicts); functional manager (person who "owns" project resources); program manager (coordinates related projects to achieve the common goal)

-Project styles: functional, weak, balanced...

-Project Manager skills: integration management (lead, communicate, solve problems, serve the rest of the project team and those above you, have strong sense of project, political savvy, share credit)

-Project stages (45 tasks). Will focus on first 2 stages. Many of the tasks at the end involve just keeping up energy and focus.

-Initiating the project: Develop the project charter and identify stakeholders

-planning: develop PMP; deliverables and milestones; create WBS; estimate costs and figure out budget;

-Group worked in pairs for 8 minutes about the project charter and stakeholders (business case; final deliverables (4 SMART goals); stakeholders; project partners; team assignments; organizational goals (the business case in one sentence))

-Scope and requirements estimate: put limits on deliverables and articulate why; what will you need in order to do the deliverables

-Group worked in pairs for 5 minutes about the scope and requirements

-Activities planning: deliverables, interim and final; project tracking for the interim and final deliverables

-Group worked in pairs for 10 minutes about the activities planning.

-Activities planning: milestones (project timeline with official target dates, run parallel or sequentially)

-Group worked in pairs for 6 minutes about the milestones.

-Budgeting: go back to requirements, timeline, and deliverables (equipment, staff salaries). Propose asking stakeholders to contribute to a draft budget in order to help manage the emotional feelings of ownership of resources. Think about external costs (which could be outside the library or outside the department) and internal costs. Importance is to have a high-level understanding with a margin.

-Group worked in pairs for 6 minutes about budgeting.

-Status/communications plan: plan the reports for the project milestones as well as the regular reporting on the project progress (both from people working on the project to the project manager as well as from the project manager to stakeholders; also to the funding agency/unit)

-Group worked in pairs for 6 minutes about communications plan.

-Work breakdown schedule: road map from plan to deliverables (first by project phase, then by major activity (by deliverable), then by sub-activity (also by deliverable; start with a verb)). This takes a lot of time, but is very helpful for tracking the project

-Group worked in pairs for 6 minutes about work plan.

-Language and negotiation: remove negative words from vocabulary (no, but, we can't, won't, I don't think). Use yes, please, explain, would you, clarify, how, how can I better understand, test/trial, pause, re-imagine, re-think, how else can we get this done? (often what the perceived barrier people are doing is wanting to be more of a part of the process).