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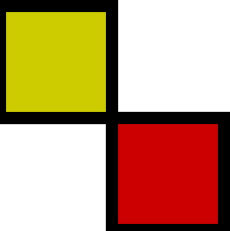
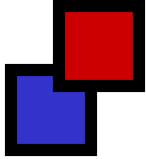
# Project Management in Libraries: Class 2



Karen Calhoun, 17 July 2014  
LIS 2971  
University of Pittsburgh



# Class 2 Outline

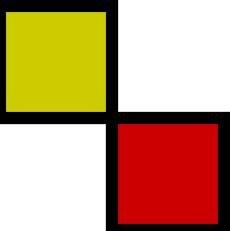
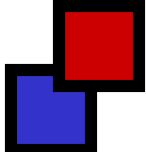
- Turn in proposals (keep a copy for yourself!)
  - Quiz
  - Glossary terms – Scavenger hunt
  - Initiating a project
  - Project charter
    - Project sponsor
    - Project objectives (and SMART objectives)
    - Deliverables
    - Scope
    - Assumptions, constraints, dependencies
  - Role and knowledge of the project manager
  - Exercise - Whirligig case study
  - Some in-class work on your project charters (sections 1-4)
  - Preparing for next class
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# QUIZ

00:00

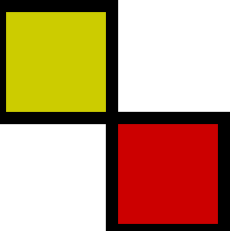
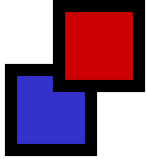


# Rules for glossary scavenger hunt during this class

- **Locate your copy of the “glossary” handout**
  - The object of the game is to recognize and “claim” the first mention of any word or phrase in the glossary
  - “Claim” a glossary word or phrase by raising your hand; Karen or Jessica will then write it on the whiteboard under your name (all simultaneous claimants get credit)
  - At an appropriate point, Karen will ask someone to volunteer to define the word or phrase (definers get credits too)
  - At the end of class, the person who has claimed and/or defined the most words and phrases wins a small prize 😊
- 
- 



# Project Initiation

- 
- Authorize expenditure of resources
  - Assign project manager
  - Establish roles and responsibilities of project manager and other key participants
  - Identify high-level goals/objectives
  - Notify people/organizations affected by project
- 



# Why Projects Fail



Projects can fail for *many* reasons.

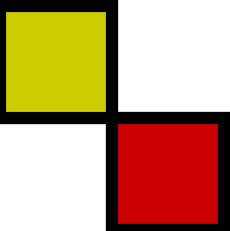
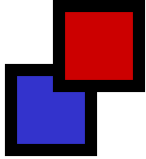
Many of the fundamental problems can be avoided at the start of the project with a little bit of planning and conversation.



Source: Sierra, Tito. 2011. "The Project One-Pager." Slide 3. PPT. file. [CC-BY 3.0 US](#)



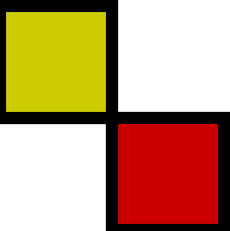
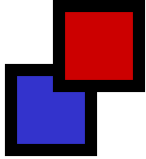
# Why Projects Fail

- 
1. The **goals** of the project are unclear
  2. There is **disagreement** about the goals of the project
  3. The **requirements** of the project are ambiguous or unrealistic
  4. The project is **inadequately staffed**
- 

Source: Sierra, Tito. 2011. "The Project One-Pager." Slide 7. PPT. file. [CC-BY 3.0 US](#)



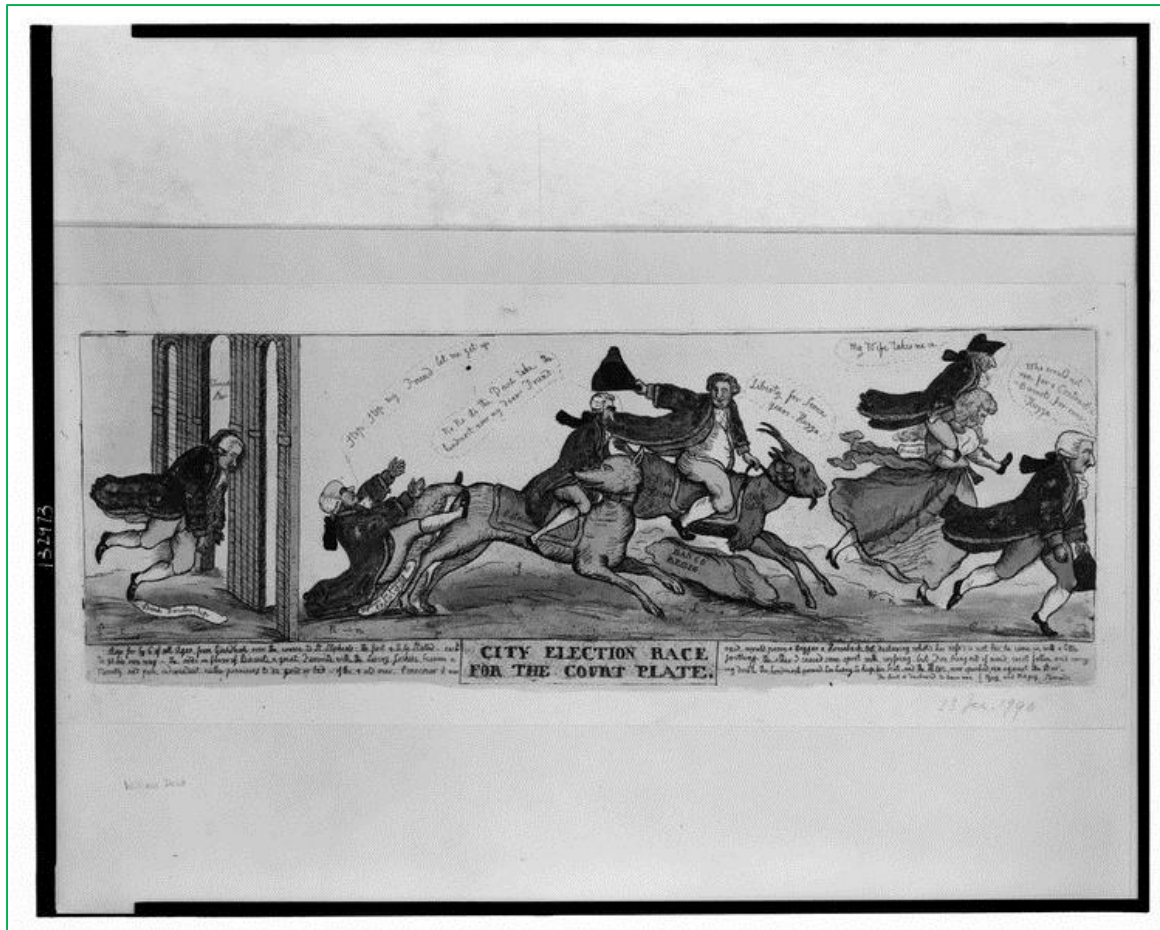
# Why Projects Fail

- 
5. Lack of consensus on **project roles** (i.e., who does what)
  6. The proposed **schedule** for the project is completely unrealistic
  7. The **scope** of the project is poorly managed or unconstrained
  8. The project **doesn't make sense** upon closer inspection
- 

Source: Sierra, Tito. 2011. "The Project One-Pager." Slide 11. PPT. file. [CC-BY 3.0 US](#)



# Getting Off to a Good Start



# Getting Off to a Good Start

## The Project One-Pager

"A planning and communication tool that enables a **shared understanding** of the project before it begins."

--Tito Sierra

## Project Charter (PMI)

"A document issued by the project initiator or sponsor that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources project activities."

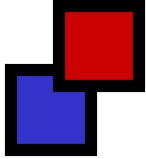
--*PMI Lexicon*



Now let us be perfectly clear...  
(see our project charter template)

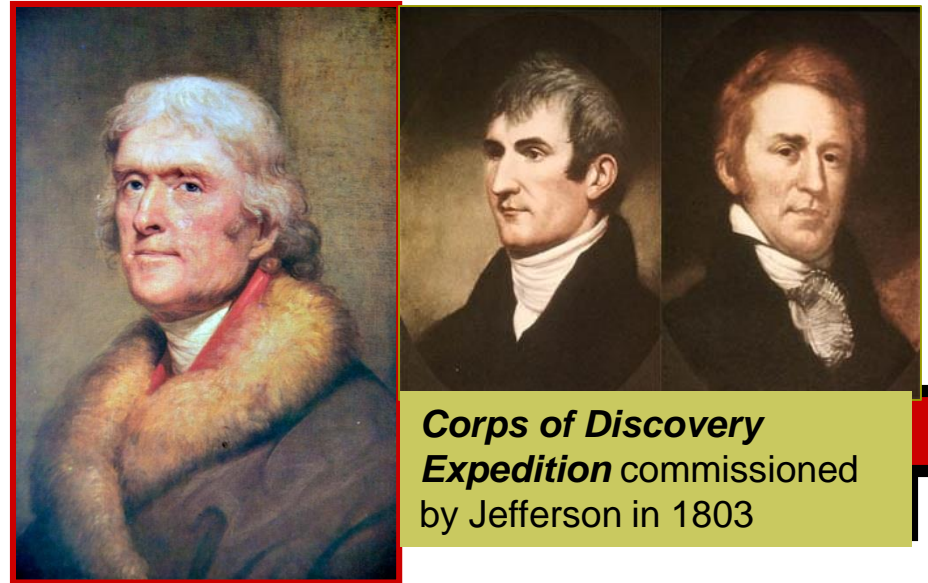
- 
- Project name
  - Project sponsor(s)
  - Project manager

**Next  
Class**

- 
1. Project objective(s)
  2. Deliverables (high level)
  3. Scope
  4. Assumptions, constraints, dependencies
  5. High level timeline (WBS)
  6. Project team, consultants, stakeholders

# Role of the Project Sponsor

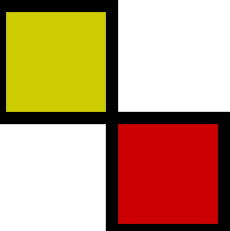
- Set strategic direction, steer, guide & coach; help initiate
- Stay informed; assure continued interest in project
- Help resolve major issues
- Obtain resources
- Communicate and manage key relationships at higher levels



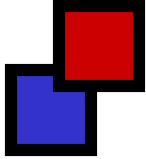
Images: Tony Fischer photo of Rembrandt Peale's portrait of Thomas Jefferson. [CC-BY 2.0](#).  
Lewis and Clark: composite image in public domain.



# Project Objective(s)



“The object of your mission is to explore the Missouri River, & such principle stream of it, as, by its course and communication with the waters of the Pacific ocean, whether the Columbia, Oregon, Colorado or any other river may offer the most direct & practicable water communication across this continent for the purpose of commerce.”—Jefferson’s instructions to Lewis and Clark



As quoted by Ambrose, Stephen E. 1996. *Undaunted Courage: Meriwether Lewis, Thomas Jefferson, and the Opening of the American West*. p. 94.

# SMART objectives - HANDOUT

S

• Specific

M

• Measurable

A

• Attainable

R

• Relevant

T

• Time-bound

“By [YEAR], reduce the proportion of adults who engage in no leisure-time physical activity.”

(US Dept of Health and Human Services)

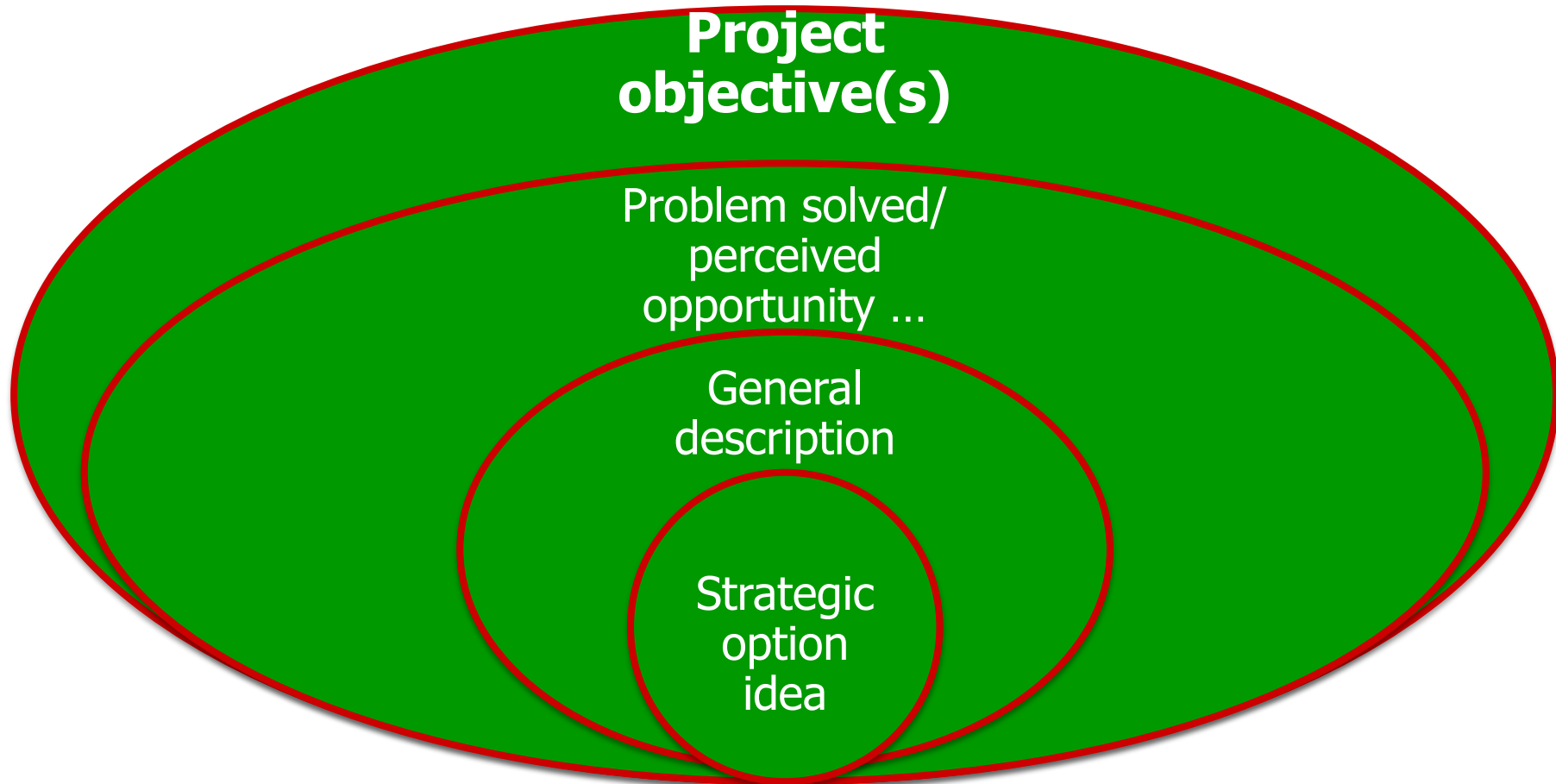
Was Jefferson’s instruction to Lewis & Clark a SMART objective?



**Break: 10 Minutes**



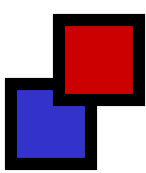
# Some inputs to your project objectives (from your proposals)







## Business objectives, project objectives, deliverables and requirements

- **“Business” objective:** “Enhance family relationships” (the *reason* for doing a project)
  - **Project objective:** “Hold a family reunion in 2014” (a means to an end)
  - One deliverable: the date and location (something to be delivered to achieve the project objective)
  - Some requirements for date and location:
    - Pick date/location convenient to large number of family members
    - Must not be a school day (also a constraint)
    - Wheelchair accessible
- 



# Project Charter Template - HANDOUT

## PROJECT CHARTER

---

Project Name:	Project Sponsor:
Date:	Project Manager:



### 1. PROJECT OBJECTIVES

Describe the project objective(s). What is the outcome (product, service, or result) of the project to be undertaken? State the project objective as a SMART objective if possible. |

This section should also briefly describe the need, opportunity, benefits and/or problem that the project intends to address or provide – i.e., the project justification, or business objective of the project.

### 2. DELIVERABLES

Provide a high level list of "what" needs to be accomplished/delivered in order to accomplish the objectives of the project. Each deliverable should be sufficiently detailed so that the Sponsor and Project Team will understand what will be achieved (in tangible, verifiable terms). Describe the deliverable using action words (verbs) such as "deliver, provide, create, research, etc.

Deliverables should be measurable, so the Project Sponsor and Team can determine whether the deliverable has been successfully completed at the project's conclusion. They should also be traceable to the project's high level requirements (see next section).

# Examples of Some Project Charters - HANDOUTS



University of Pittsburgh

University Library System


`pitt_bluegold_sig`

CHARTER  
TECHNICAL SERVICES SHAREPOINT SITE PROJECT  
Academic year 2013 – 2014

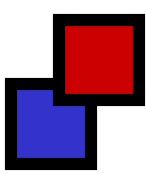
CHARTER  
Twitter and the University Library System  
Academic year 2013 – 2014

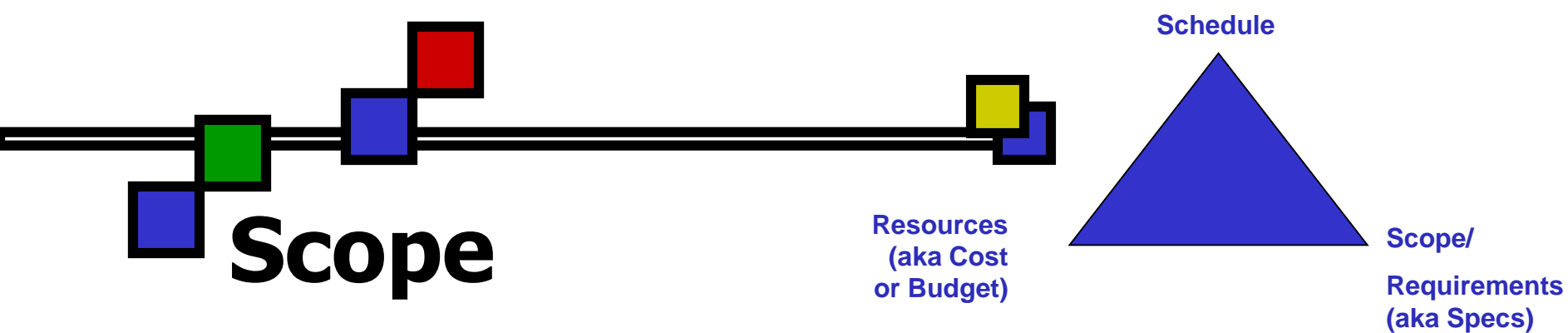
CHARTER  
ULS ACTION 10 TECHNOLOGY TRAINING PROJECT  
Academic year 2013 – 2014

CHARTER  
Move of Government Documents from 4<sup>th</sup> to 5<sup>th</sup> Floor of Thomas Blvd.  
Academic year 2013 – 2014



# Individual and Small Group Exercise (25 minutes)

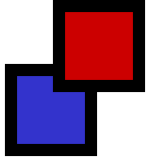
- By yourself, take a few minutes to glance through the “objectives” (or “goals”) and “deliverables” sections of the sample project charters
  - By yourself, jot down a few ideas for your project objectives and deliverables (be sure to consider the work you’ve already done on your proposal!)
  - Working in your group, identify 1 or 2 questions you want to ask about how to fill out these sections of the project charter
  - Report your questions out to the larger group for discussion
- 



- What the project IS and IS NOT
- An element of the “triple constraint” (remember this?)
- Ideally, what project stakeholders have agreed will be delivered, within a certain time, with a defined set of resources
- A clear understanding of scope is the **basis for responding** to the inevitable requests for change during the project’s life cycle
- Watch out for **scope creep!**



# Assumptions, Constraints, Dependencies

- **You cannot begin a project with certainty!**
  - Best thing you can do is document the uncertainties
    - And *use them* to help define schedules & resource needs and set scope
  - **Example assumption:** We have been given a budget of \$10,000 for the consultant we want to hire, and we believe this amount is sufficient.
  - **Example constraint:** We must finish this move by the start of the fall term. If we don't, we must wait until the end of the spring term to complete it.
  - **Example dependency:** Ms. IT-wizard is working on another project now but will be available for our project in 2 months' time
- 



# Roles of the project manager

- Plan, organize, execute, control, close the project
- Continuously balance the triple constraint
- **Communicate** and manage relationships
- Build/maintain project team performance; work with stakeholders and others; manage expectations
- Anticipate and track risk
- Integration (conductor of the orchestra)
- Procurement/contracting (sometimes)
- Quality assurance/evaluation and testing (sometimes)





# Competencies and Skills of a Project Manager

- “As much as 90% of a project manager’s time may be spent on communication flow.”—Marrill and Leshner, 322
- “The project manager becomes the link between the strategy and the team.”—PMBOK 1.7.1
- **Leadership**
- **Team building**
- **Motivation, coaching**
- **Communication**
- **Influencing**
- **Decision making**
- **Political and cultural awareness**
- **Negotiation**
- **Trust building**
- **Conflict management**
- **Delegation**



# The Case of the "Accidental" Project Manager: The Whirligig Collection

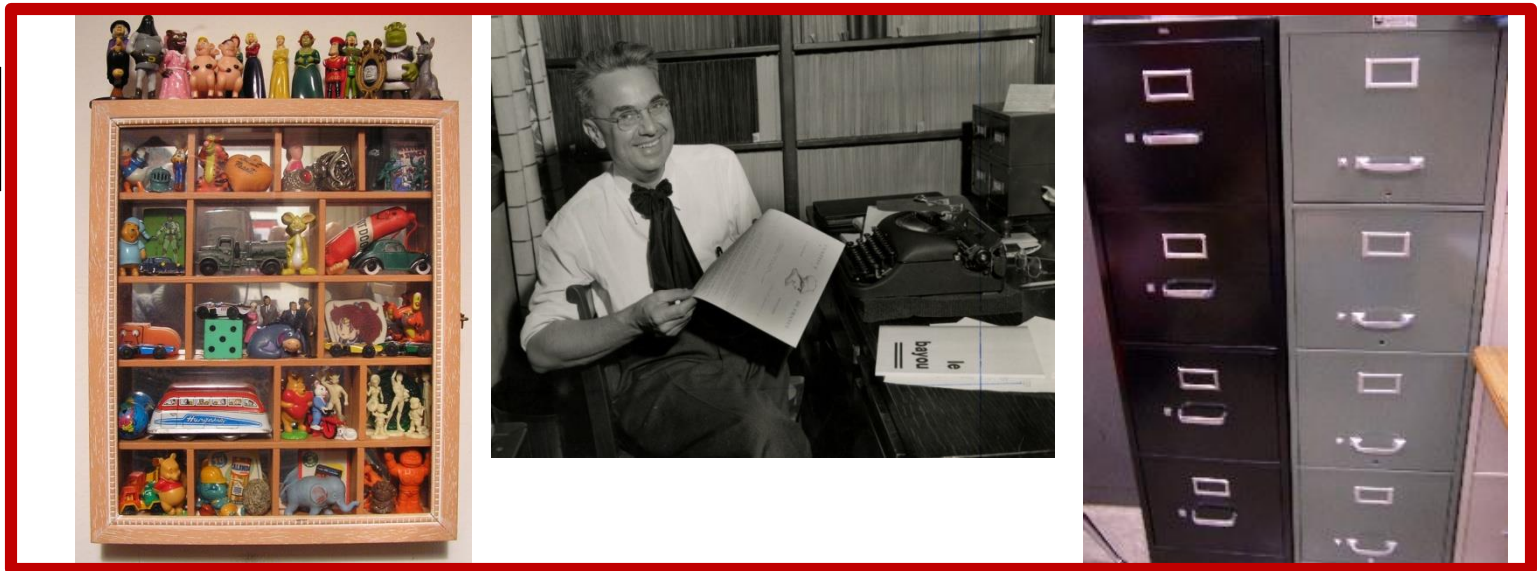
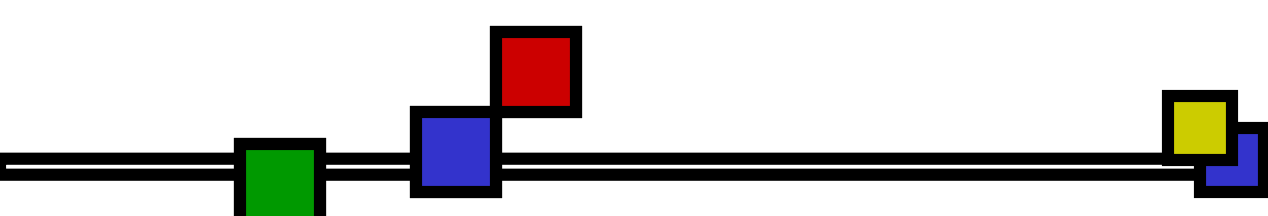


Image credits:

Teeny tiny toys by David Zellaby. <http://www.flickr.com/photos/toymaster/285322825/>. [CC-BY-NC-ND 2.0](#)

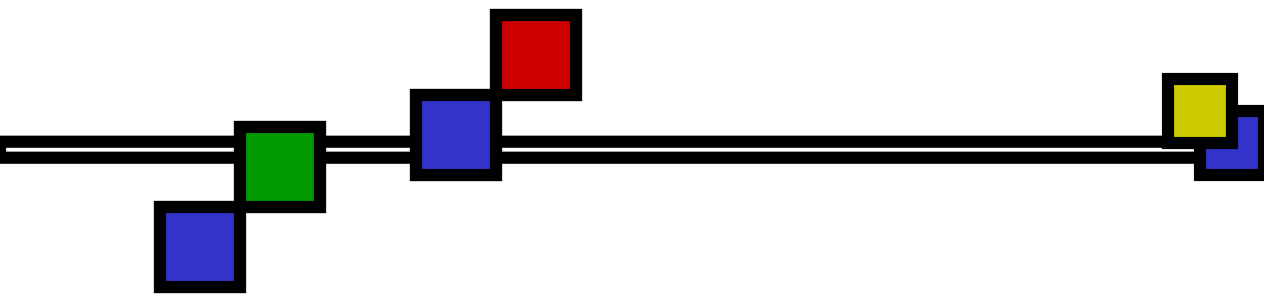
Photo of professor. Public domain. University of Houston.

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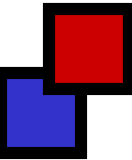
# Whirligig Case Study Exercise (20 minutes)

1. By yourself, take a few minutes to read the HANDOUT (5 minutes)
2. Read the case a second time, considering these questions (5 minutes)
  - a. Do you know who the project sponsor is?
  - b. Does the sponsor(s) understand his/her role?
  - c. Do you know the objectives and deliverables of this project?
  - d. Do you know what resources you have to work with?
  - e. Is the timeline clear?
  - f. If not, whose responsibility is it to clarify these things?
3. Class discussion (10 minutes)



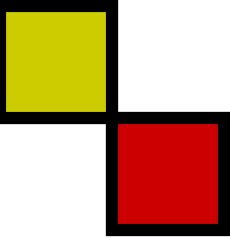
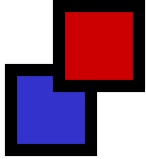
# Negotiation

- Avoid and resist irrational assumptions
- It is impossible to do the impossible
- The earlier bad news is known the better
- Avoid unhelpful coping behaviors - negotiate instead!





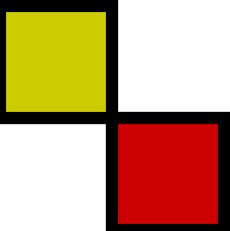
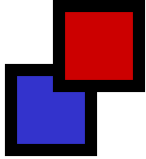
# Process Notes

- 
- Project Manager writes first draft
  - Kickoff meeting to review one-pager
  - Solicit feedback from core team
  - PM revises document for next review
  - Rinse and repeat until consensus
- 

Source: Sierra, Tito. 2011. "The Project One-Pager." Slide 25. PPT. file. [CC-BY 3.0 US](#)



# Closing Thoughts

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1. Good communication is the key to get a project off to the right start
  2. Collaborative planning at the start can help minimize *gotchas* later
  3. Simple tools work best
- 

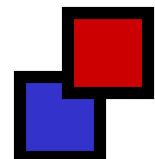
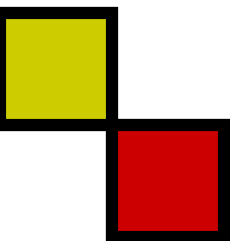
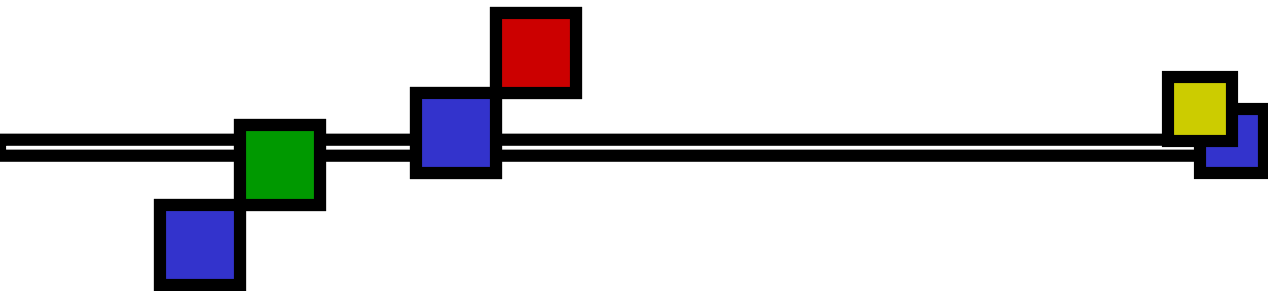
Source: Sierra, Tito. 2011. "The Project One-Pager." Slide 33. PPT. file. [CC-BY 3.0 US](#)



Stay tuned ... We'll come back to Whirligig in another class...



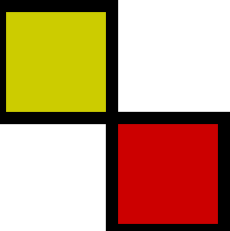
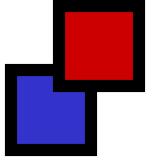
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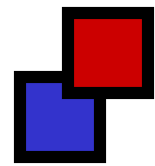
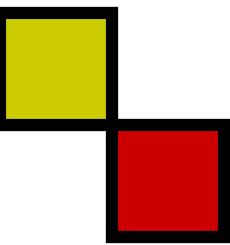
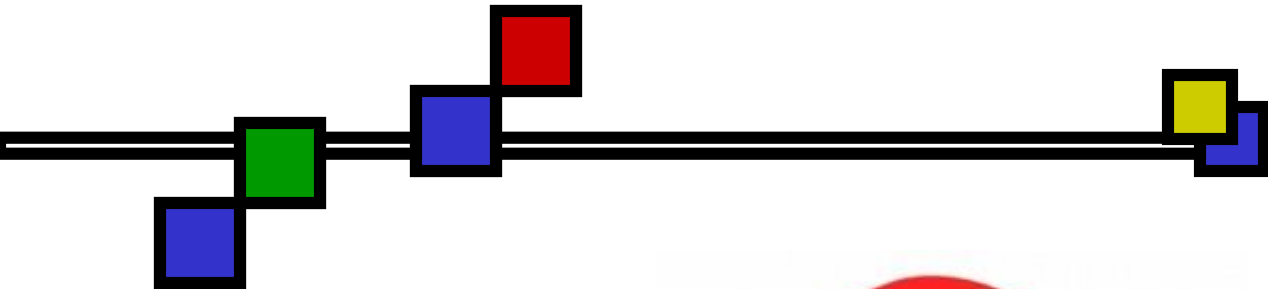
**PREPARING FOR NEXT CLASS**



# JULY 24

- Review course materials to this point (esp. SMART objectives handout and handouts of sample project charters)
  - Draft **sections 1 to 4 of your project charter – due at the start of class on July 24** – bring 2 copies!
  - Read *PMBOK Guide* intro to chapter 10 up to section 10.1; intro to chapter 13 up to section 13.2
  - Watch and study Starr, Joan. 2010. “Managing Stakeholders”
  - There will be a **quiz** at the start of class on July 24
- 
- 





**Questions before next week's class?**