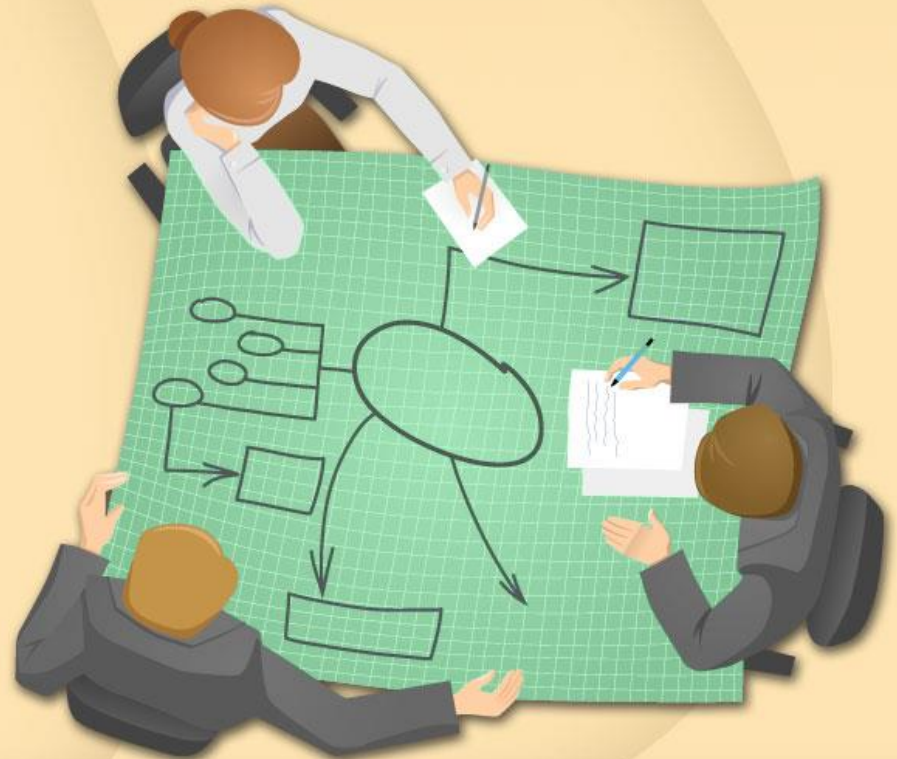


Project Management in Libraries: Class 3

Karen Calhoun, 24 July 2014
LIS 2971
University of Pittsburgh



Class 3 Outline

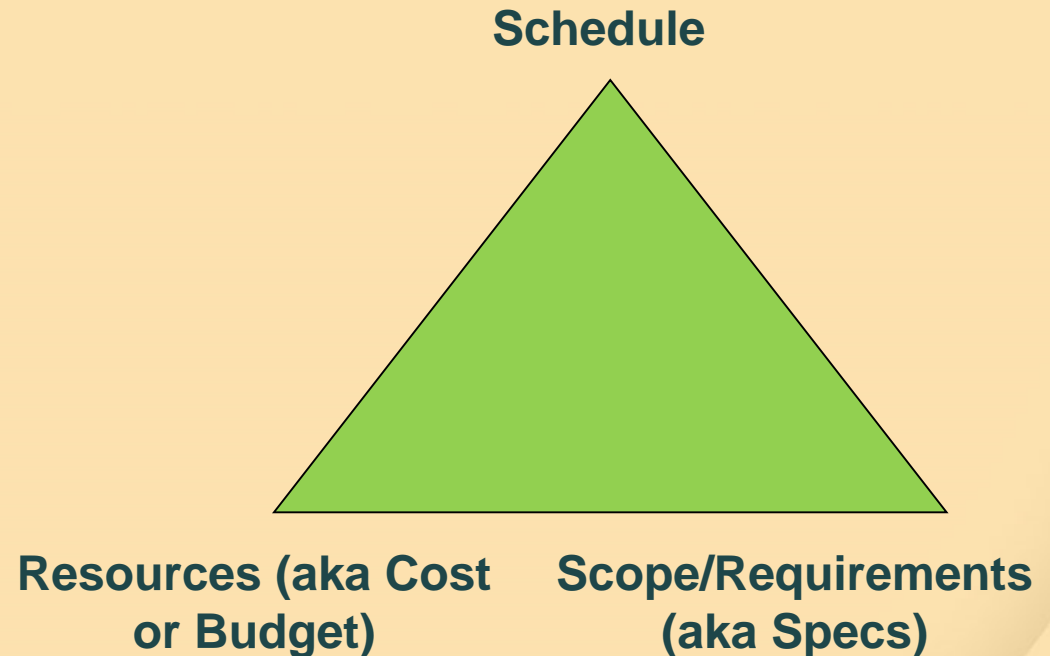
- Turn in first draft of your project charter (keep a copy for yourself!)
- Quiz
- Questions about sections 1-4 of draft charters?
- Roles of key players in projects
- Identifying and working with stakeholders (Whirligig case study)
- Project communications and tools
- Project charter
 - 5 - Project timeline (WBS)
 - 6 - Project stakeholders and teams
- Some in-class work on your project charters (sections 5-6)
- Preparing for next class (the last one!)

QUIZ.

00:00

Questions about sections 1-4 of your charters? How is it going?

1. Objectives
2. Deliverables
3. Scope
4. Assumptions, constraints, dependencies



What is this triangle called?

Some Key Players in Projects

- Sponsors (discussed in class 2)
 - (A sponsor is a stakeholder)
- Team members (discussed in class 4)
- Stakeholders
 - *PMBOK*: An individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project, program, or portfolio.

Starr Steps – Managing Stakeholders

1. ID stakeholders

- Internal
- Part of community
- External

2. From whom would you accept a change?

- = Primary stakeholders

3. Establish communications plan

- 2-way
- Optimized for primary stakeholders
- What kind of communications?

4. Build in meaningful tasks involving stakeholders

- Kickoff
- Requirements gathering
- Steering group?
- Testing

Starr, Joan. 2010. "Managing Stakeholders."

<http://www.slideshare.net/joanstarr/managing-stakeholders-3209804>.

Mapping the Stakeholder System of Your Project

- Key to managing the politics of your project
- So you focus your energy on influencing the right people
- So you don't forget anyone
- So you can manage opposition and resistance
- Prerequisite for ***communications*** and for “selling” your project from start to finish

What is politics?

- Actions and interactions with people that affect the achievement of your goals
- Using the power and influence of others to mobilize people and resources to get things done
- “All the things that happen and you don’t know why”—Anon.

Basic assumptions

- Politics are inevitable
- Politics are necessary
- Politics can't be eliminated, but they can be managed
- Don't assume politics is somebody else's job



Image: "A Caucus Race and a Long Tale."
Illustration by John Tenniel 1865 (public domain). From *Alice in Wonderland*.

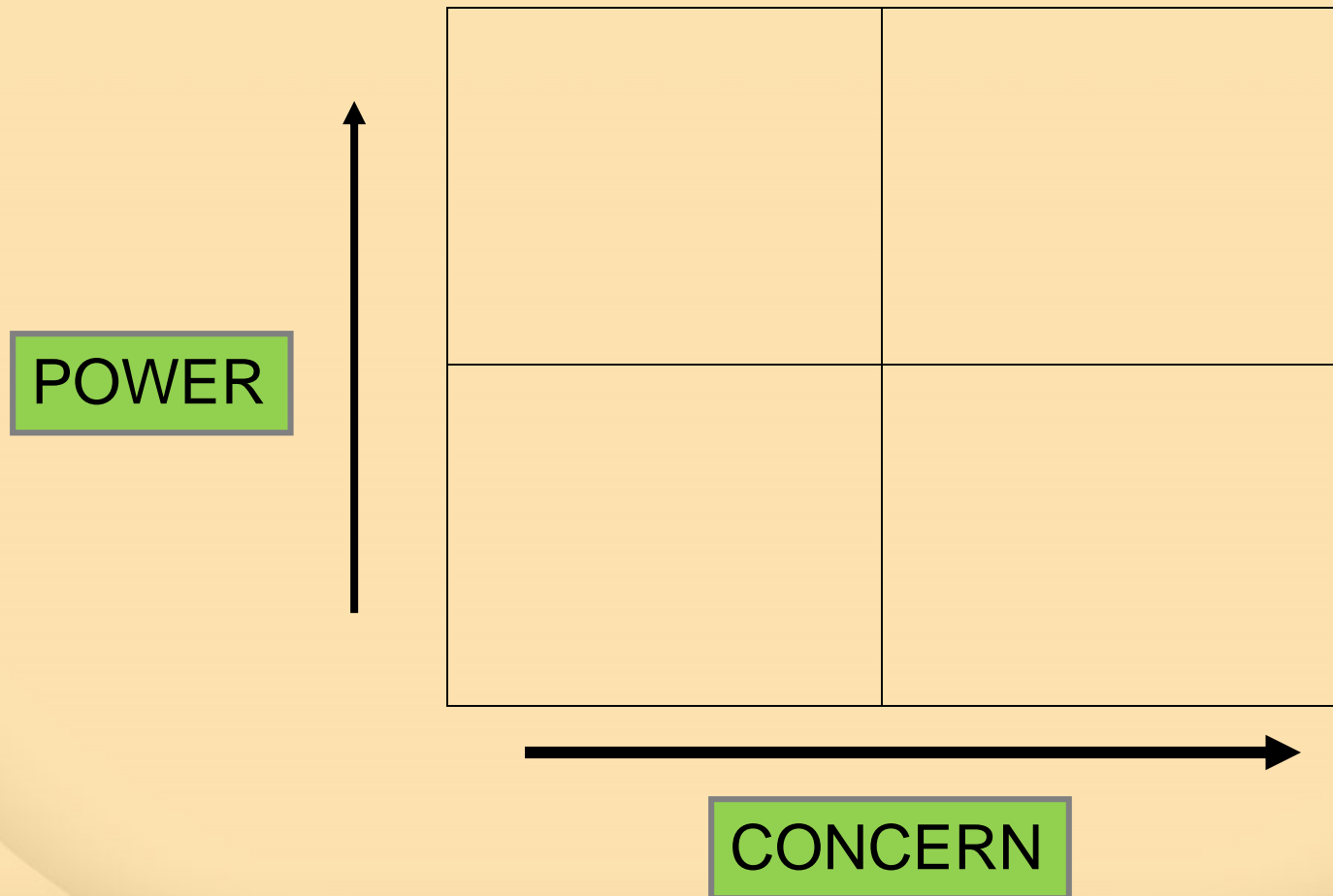
A Stakeholder System Has “Clients”

- **Sponsoring client** —person in position to set strategic goals; person who ultimately decides; person best able to break ties
- **Power client** —person who grants access to people and resources; person with whom deals are struck
- **Legitimizer** —person who protects the status quo; subject matter expert; person who influences acceptance
- **Opinion leader** —Person who is receptive to new ideas; recognized as “up and coming”
- **Career influencer** —your boss or bosses
- **Champion** – advocates vigorously for the project

Identifying Stakeholders

- Who is resourcing (or funding) the project?
- Who makes “go” or “buy” decisions?
- Who will use the results; who benefits?
- Who originates? (And/or is it someone’s “pet idea”?)
- Who defines “success”?
- Who is an expert?
- Who loses (credibility, something of value)?
- Who is open to the new idea?
- Who is good at stirring up excitement?
- Who evaluates against the status quo?
- Who is the first to see flaws or problems?
- Who will feel the impact?
- Who does the work?
- Who will maintain the outcome?
- Who knows the “big picture”—future direction?

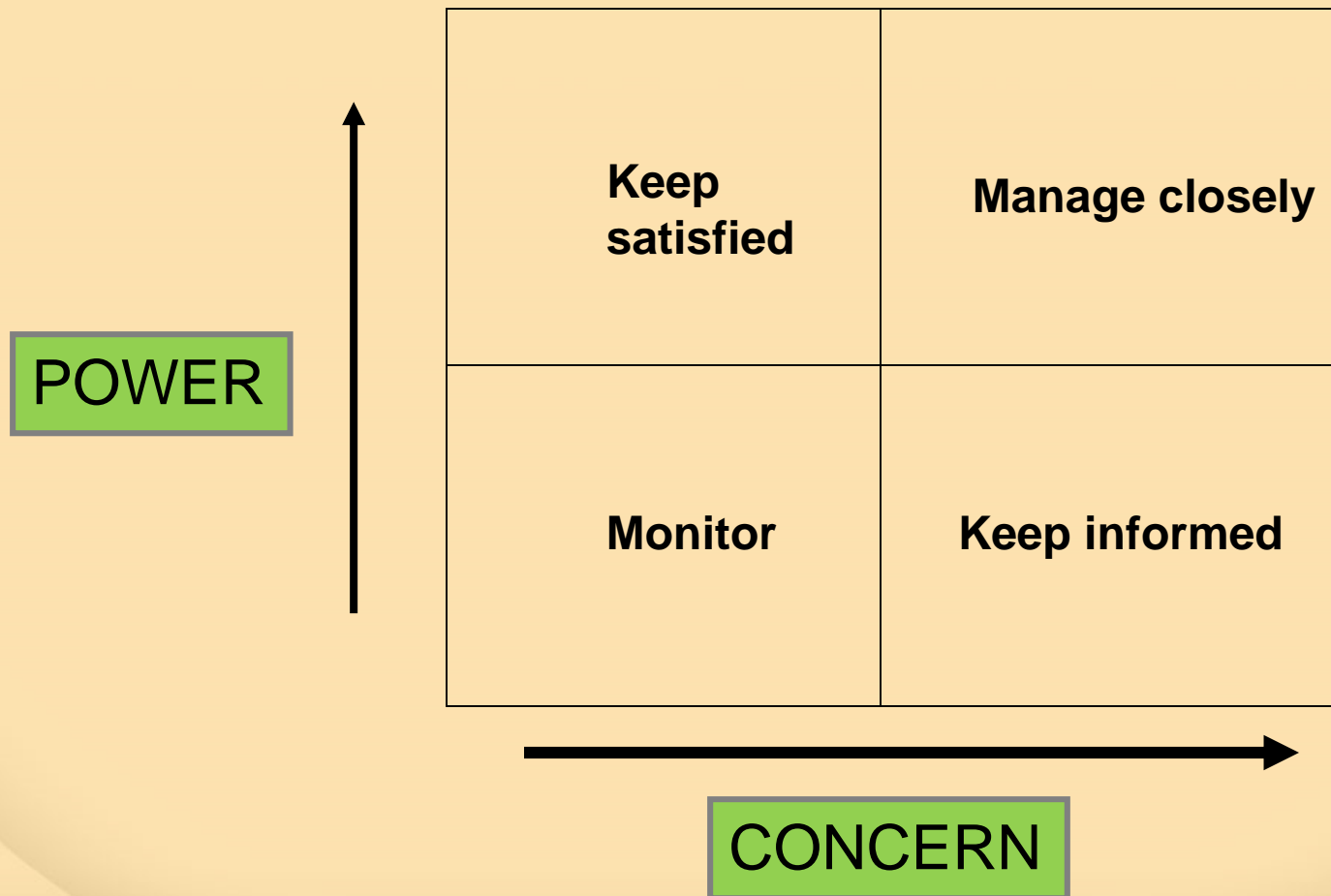
SMALL GROUP EXERCISE: Stakeholder Analysis for the **Whirligig Project**—Grab Your Post-Its!



Worksheet Template for Tracking Project Stakeholders

Stakeholder	Role/ Responsibility	Needs	Power (1-4)	Concern (1-4)

How much attention and what kind?



Based on PMBOK figure 13-4.

Influence Tactics

- **Reason** – using facts and data to develop a logical argument
- **Coalition** – mobilize other people
- **Friendliness** – create good will
- **Assertiveness** – a direct and forceful approach
- **Negotiation** – exchange of benefits
- **Higher authority** – gain the support of higher ups to mobilize others
- **Sanctions** – use organizationally derived rewards and punishments

Want to assess **your** style? See Kipnis, David, and Stuart M. Schmidt. 1982. Profiles of organizational influence strategies (POIS). [San Diego, Calif.]: University Associates. [\(See an online sample of the survey\)](#)

Many project managers ...

- Try reason and friendliness first
- Use assertiveness and higher authority second
- Underuse coalition and negotiation
- All tactics are good, when used in the right circumstances and for the right reasons

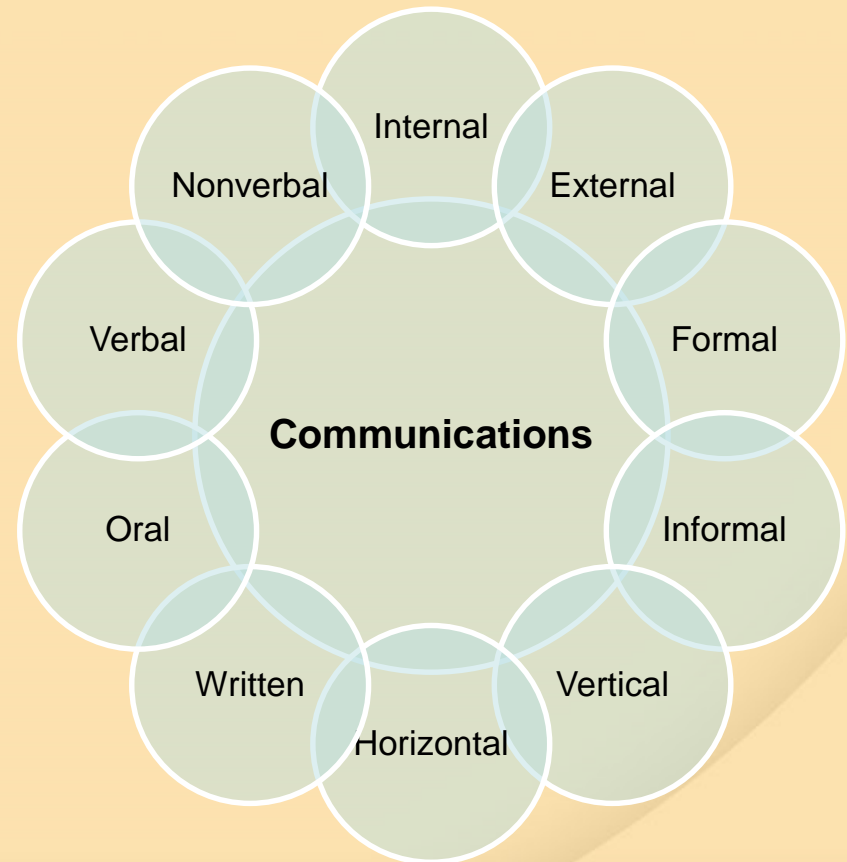
Break: 10 Minutes



Project Communications

- “Project managers spend most of their time communicating with team members and other project stakeholders, whether they are internal (at all organizational levels) or external to the organization.”—*PMBOK* section 10

Multidimensional, multifaceted



Communication skills – PMBOK 10 - HANDOUT



Wordle cloud created from handout (PMBOK section 10 – communication skills)

What is RACI?

R - Responsible

- The one who performs the task

A - Accountable

- The one who has the final authority or accountability for the task

C – Consulted

- Those who are consulted and asked for advice before and during the task

I – Informed

- Those who are informed after the task is completed

Warning: Some sources flip the definitions of “R” and “A”—doesn’t matter as long as you and your team are clear what each means

RACI Chart (Responsibility Assignment Matrix) - HANDOUT

RACI Chart (Roles and Responsibilities Matrix)

For instructions / training material visit <http://www.racichart.org>

Process Name / Description: *Plant maintenance project: Repair and resurface plant parking lot during plant shutdown in July*

Created On: *Jan-12* Revision: *4/1/2012*

Created by: *Kelly Bradley (facilities mgr), Mike Cole (plant manager), Joe Pallino (HR), Brian Sullivan (security), Billy Ownens (project manager)*

	Facilities Mgr	Plant Mgr	HR	Security	Project Mgr
Identify a minimum of three asphalt contractors from Angie's List	C	-	-	-	R
Arrange for contractor visits and quotes	I	-	-	-	R
Review quotes and references, make contractor selection	A	I	I	-	R
Review and finalize contract, lock in plant shutdown week	I	I	-	-	R
Communicate project to shutdown maintenance crew, make sure all vehicles are removed from the lot	I	I	R	I	I
Provide security gate access codes for asphalt crew by June 15	I	-	A	R	I
Oversee the project during the plant shutdown week, ensure it is completed on time	A	I	I	-	R

R = Responsible, A = Accountable, C = Consulted, I = Informed

© 2012 racichart.org

Why RACI charts?

- Simple yet powerful tools
- Assign clear ownership for each part of the work
- Assign *communication responsibilities* for any situation
 - Who do I communicate with?
 - What do I communicate?

PREPARING A WORK BREAKDOWN STRUCTURE

Work Breakdown Structure (WBS)

- Glossary: A WBS is a hierarchical decomposition of the total scope of work to be carried out by the project team to accomplish the project objectives and create the required deliverables.
 - See WBS HANDOUT
- Basis for section 5 of your project charter: high level project timeline
 - See your draft project charter (section 5)

Process to create a WBS

Process:

Use a top down approach to identify the major components of work to be accomplished

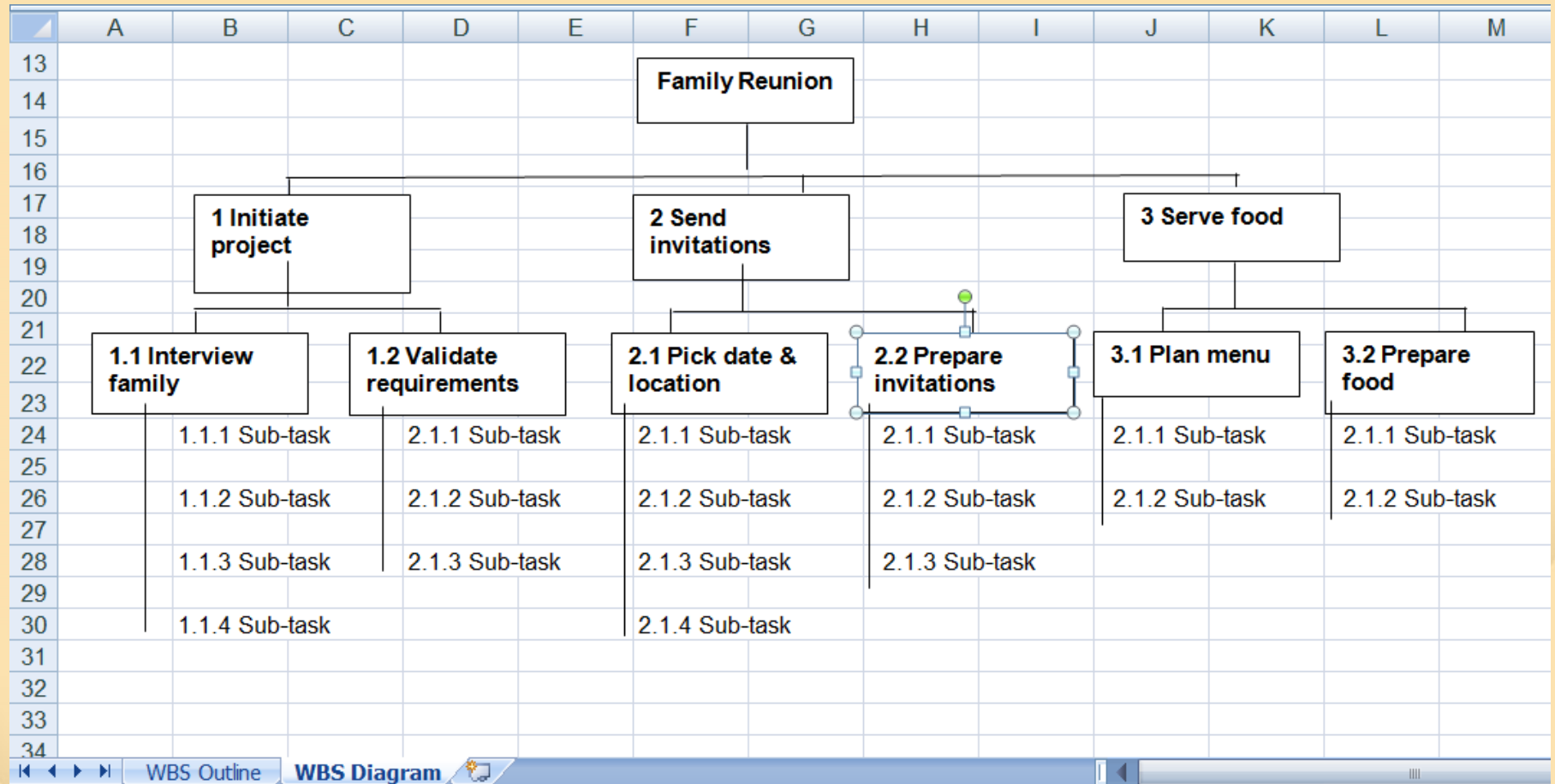
Break each major component down to an appropriate level of detail

*Name each activity/task with a **verb and a noun** to describe **the work and the tangible result***

Gather information from:

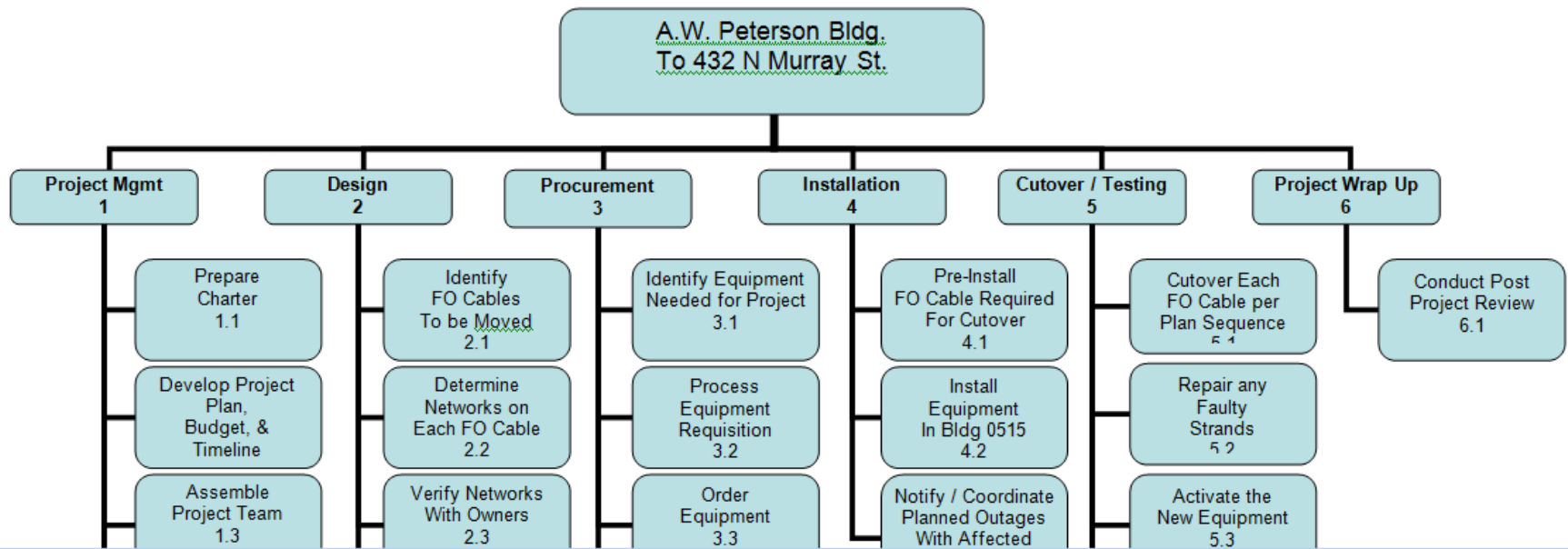
- *other team members*
- *other project managers who have done similar work*
- *previous project reviews*
- *other appropriate groups*
- *expert opinion*
- *existing Work Breakdown Structure examples*

Getting started with a WBS – example of a family reunion



Another example of a WBS – a move project

Work Breakdown Structure Example: Supernode Relocation Project



Source: "Work Breakdown Structure Examples."

http://www.pma.doit.wisc.edu/more_work_breakdown_structure.html

EXERCISE: Getting started with a WBS - Identifying major project activities

- Each person get Post-It note pad
- In your small group, write down about 3 of the highest level activities of the Whirligig project—one activity per Post-It note
- Articulate each with a verb and an object:
 - E.g., Calculate the requirements for storing the collection in the main library
 - See useful verbs HANDOUT
- Place and arrange your post-its on flip chart
- Class discussion of results

Another way to present a WBS: outline view

	Work Breakdown Structure Outline
	(task numbering optional)
	PROJECT NAME
1	Activity
1.1	Task
1.1.1	Sub-Task
2	Activity
2.1	Task
2.1.1	Sub_task
2.1.2	Sub-Task
2.2	Task
2.2.1	Sub-Task
2.2.2	Sub-Task
2.2.3	Sub-Task
3	Activity
3.1	Task
3.1.1	Sub-Task
3.1.2	Sub-Task
3.2	Task
3.2.1	Sub-Task
3.2.2	Sub-Task
3.2.3	Sub-Task

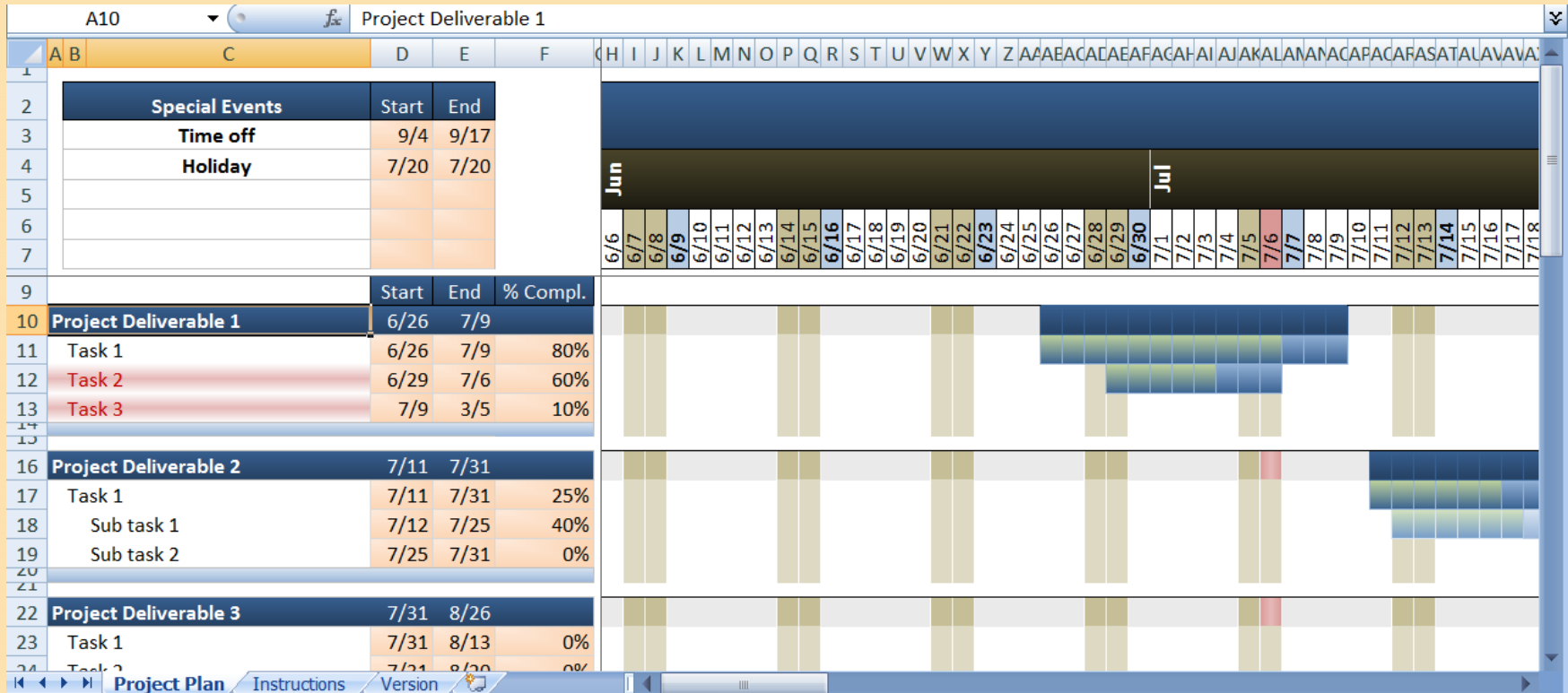
- Basis for creating a **project plan** ...
- With **estimated “start” and “finish” dates** for activities, tasks and sub-tasks and ...
- **Resource assignments** (who is responsible for each task/sub-task) and ...
- **Gantt chart** (if desired)

Example of a simple project plan

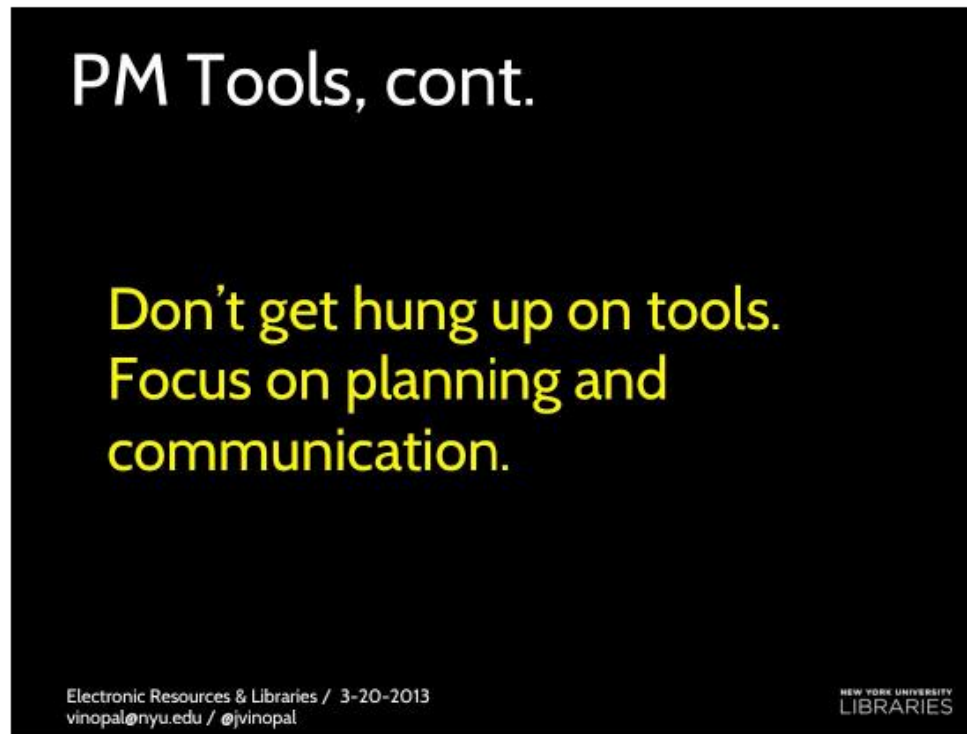
ULS Technology Skills Training Program, Phase 1 (partial view)

	Name	Start	Finish	Resource Names	T
1	Draft and agree on WG charter	11/11/13 8:00 AM	11/22/13 5:00 PM	Karen Calhoun;Working Group	
2	Gain Senior Staff approval for charter	11/19/13 8:00 AM	11/19/13 5:00 PM	Karen Calhoun	
3	Integrate WG materials in Training SP site	11/11/13 8:00 AM	11/22/13 5:00 PM	Heidi Card	
4	Arrange focus groups with supervisors	11/11/13 8:00 AM	11/14/13 5:00 PM	Bill Gentz;Clare Withers;Hei...	
5	Recruit and assign moderators and recorders	11/11/13 8:00 AM	11/19/13 2:20 PM	Heidi Card;Karen Calhoun;L...	
6	Provide training to moderators and recorders	11/11/13 8:00 AM	11/19/13 2:20 PM	Karen Calhoun;Luke Ferdina...	
7	Prepare focus group interview guide	11/25/13 8:00 AM	1/6/14 5:00 PM	Working Group	
8	Hold focus groups	1/7/14 8:00 AM	1/21/14 5:00 PM	Working Group	
9	Analyze focus groups results	1/22/14 8:00 AM	1/29/14 5:00 PM	Working Group	
10	Prepare and disseminate results of focus groups	1/22/14 8:00 AM	1/31/14 5:00 PM	Bill Gentz;Heidi Card;Karen ...	
11	Produce internal communications plan	1/22/14 8:00 AM	1/23/14 5:00 PM	Bill Gentz;Heidi Card;Paul Ko...	
12	Gain supervisor consensus	11/11/13 8:00 AM	1/31/14 5:00 PM	Working Group	
13	Prepare staff survey	2/3/14 8:00 AM	2/7/14 5:00 PM	Marc Ross;Working Group	
14	Run staff survey	2/10/14 8:00 AM	2/14/14 5:00 PM	Luke Ferdinand;Marc Ross	
15	Analyze staff survey results	2/17/14 8:00 AM	2/21/14 5:00 PM	Marc Ross;Paul Kohberger	
16	Prepare and disseminate survey results	2/17/14 8:00 AM	2/21/14 5:00 PM	Heidi Card;Karen Calhoun;M...	
17	Gain staff consensus	1/27/14 8:00 AM	2/21/14 5:00 PM	Working Group	

Gantt Chart (Timeline) – Next Class!



Vinopal's Words of Wisdom



Source: Vinopal, Jennifer. 2013. "Introduction to Project Management for Libraries".
Presented at the Electronic Resources & Libraries, March 23.

<http://archive.nyu.edu/handle/2451/31750>

Steve Jobs' Words of Wisdom

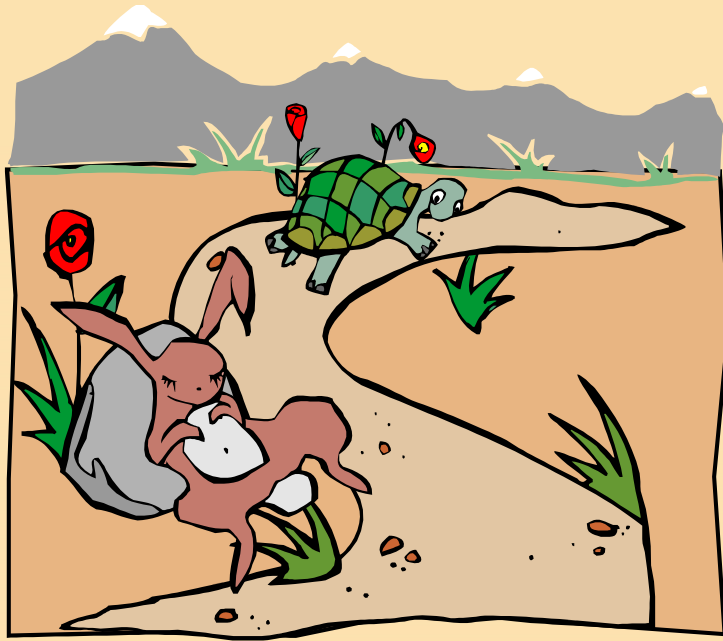
Plan in analog

Source: Gallo, Carmine. 2009. "The Presentation Secrets of Steve Jobs." Slide 13.
<http://www.slideshare.net/cvgallo/the-presentation-secrets-of-steve-jobs-2609477>

Project Timelines: Estimating Effort and Duration

- **Effort** = labor units (like person-hours, days, or weeks) to complete an activity, task or sub-task
- **Duration** = the amount of *calendar* time between the start and finish of an activity, task or sub-task
 - **If effort = 40 hours and a full-time person will devote half time to the work, then duration could be = 10 business days**
- **Bottom-up estimating** tends to be more accurate
- First, make an “unconstrained” (realistic) estimate
- *Do not* start by working back from an arbitrarily chosen due date

Some Factors Affecting Estimates



- Work environment (esp. multi-tasking)
- Complexity of task/project
- Person's skill and experience
- Team size (bigger can take longer)
- Tools and techniques

People Tend to Underestimate How Long a Task Will Take

- Because ...
 - They don't take account of “unproductive” time
 - (a full time person on a project full time actually devotes about 25 hours a week to the project)
 - Productivity factor = 63%
 - Q: How long will it take you?
 - A: 10 hours
 - Estimate: $10 / .63 = \sim 16$ hours

The Key to a Good Estimate: Gaining Commitment



- Collaborate/negotiate with team members
- They know better/more than you do how long it will take
- Estimate one-to-one or in groups of not more than 3 or 4 counting yourself
- Opportunity for team building

What If My Estimated Project End Date Doesn't Match the Deadline?

- **Think** about the Triple Constraint ... to make up for less time, something has to give ... either project scope/requirements (quality) or resources (budget) or a combination
- **Negotiate** to fit the time constraints ... or change them!

PREPARING FOR NEXT CLASS

JULY 31

- Review materials from this class (esp. these slides and the handouts)
- Create a WBS outline or diagram for the top two levels of your project (you will need it for section 5 of your charter)
- Start thinking about your project team (more next week)
- Draft **sections 5 and 6 of your project charter – due at the start of class on July 31** – bring 2 copies!
- Read *Jones and Murray* pages 120-128.
- Read Horwath 2012. “How Do We Manage? Project Management in Libraries: An Investigation.” *Partnership: The Canadian Journal of Library and Information Practice and Research* 7 (1).
- There will be a **quiz** at the start of class on July 31

Discussion, feedback, questions?



Photo by RVWithTito, CC-BY

<http://www.flickr.com/photos/rvwithtito/6161674618/>