Project: Idea to Closure

Kirsten Clark, University of Minnesota Libraries - Twin Cities, clark881@umn.edu

Agenda

Overview

Project Management Handbook Copy for this Presentation:

https://z.umn.edu/PMHandbook-PMIG

University of Minnesota Libraries - Twin Cities Campus

From Ideas to Project Completion

STAFF LEAD IDEA DEVELOPMENT

Idea! Create an Idea Proposal - (Ideas can come from anywhere in the organization)

Resubmit

Revise Idea Proposal

Not Right Now...

Defer or Forgo Idea

Revise

ADMINISTRATIVE REVIEW

Supervisor Reviews Proposal

Yes

Director/AUL Reviews Proposal

Yes

Supervisor/Staff works with Director/AUL to develop a Project Charter & Initial Budget - (Administrative ideas may start here)

Cross Divisional Review

Other Stakeholders Review & Provide Feedback on Charter

AULs & Cabinet Review Charter & Budget

Yes

Dept/AUL Approval

Idea moves through organizational structure. Departmental level projects may not require all project workflow steps.

Charter revised based on feedback.

PROJECT TEAM PROJECT WORK

Project Team Kick-Off w/ Sponsor

Request Additional Resources & Budget (if necessary)

Finalize Charter & Budget

Sponsor Approves & Shares Final Charter

Project Team Work

Project Team Final Report

Deliver Recommendations & Report

Stakeholders & Resource People Engaged Throughout

TEAM + ADMINISTRATION REVIEW + IMPLEMENT

Sponsor Reviews Final Report & Recommendations

Advance Recommendations

Cabinet Reviews Final Report

Track Progress & Decisions

Revise or Move to Close Out

Approval - Funding & Resourcing Decisions

Project Team Implements Recommendation or an Implementation Team is formed

Project Team & Sponsor Implement Project Close Out Processes

Revise

Close Out

What is a Project?

Individual or collaborative work that requires planning to accomplish specific tasks. Project work effort is bounded by time and scope.

Proposing an Idea

- Introduces an idea to see if it should be a project
- Provides opportunities for anybody in the organization to present a project idea
- Simplifies the approval process by letting proposal initiator know what questions will be asked

Proposing an Idea

UL Project Idea Proposal
- Idea description
- Background and Rationale
- Resources needed
  - Staff
  - Budget
  - Space
  - Materials
- Additional information

Scope & Development of Charters

- Provide a single discussion point to move ideas up and down the organizational ladder
- Take an 'idea' and apply consistent parameters and definitions
- Acknowledge the questions that consistently come up in project development

Scope & Development of Charters

UL Project Charter template

- Background and Purpose
- Project Relevance to University Libraries
- Project Sponsor
- Project Team Members & Roles
- Project Scope
- Project Outcomes
- Project Timeline & Milestones
- Project Budget
- Risks & Related Issues

Notre Dame Project Charter template

- Members of the Project Team
- Description of the Project
- Objectives and Content
- Scope of the Project
- Project Milestones and Deadlines
- Measures of Success
- High Level Risks
- Assumptions and Constraints
- Project Acceptance and Sign off

Team Member Roles & Work Breakdown Structure

- Assigned Roles Create Clarity
- Assigned Roles Ensure All Jobs Get Done
- Tracking Work is Easier
- Breaking Work into Smaller Tasks Allows for Timeline & Milestone Planning
- Breaking Work into Smaller Tasks Helps Understand Next Steps

Team Member Roles & Work Breakdown Structure

Types of [Roles](#) on a Project Team

Work Breakdown Structure (WBS) breaks down work into smaller outcomes and tasks making it easier to prioritize outcomes, assign tasks to individuals or teams, and estimate the time and effort required for each task, and thus the time and effort required for the entire project. [[Example here](#)]

Communication and Authority

- Provides transparency in discussion and decision-making
- Keeps everybody in the loop
- Ensures a consistent message regardless of internal/external needs

Communication

[UL Draft Communications Plan](#)

- Team Member
- Stakeholder
- Message Type
- Schedule
- Method/Tool
- Status
- Notes

[Template: UL Authority Matrix (RASIC)](#)

Organizing Meetings

- Clear understanding of purpose.
- Accomplish more when efficient.
- Attendees come prepared.
- Action items and next steps are clear.

Organizing Meetings

[Training Resource: Meetings - Setting Meeting Ground Rules Best Practices](#)

[Template: UL Project Meeting Agenda and Notes](#)

- Prep notes
- Announcement
- Topics
- Notes
- Decisions
- Action Items

Tracking Project Status

- Transparency
- Being able to easily point to where the work is at a given time
- Can provide opportunities to recognize connections, missed steps, dependencies, etc.

Tracking Project Status

Template: Gantt Chart
- Time Segments
- Actions
- Milestones
- Planned/In Progress/Completed

Notre Dame Project Schedule Gantt Chart
- Actions
- Start Date / End Date
- Timeline
- Status

Final Report, Project Closeout and Celebrating

- Ties project beginning (charter outcomes) to end result (report decisions & recommendations).
- Ensures all documents for the project are in one place.
- Provides sense of completion for the team and the organization.

Final Report

[Template: UL Project Final Report](#)

- Responds to outcomes of initial charter
- Provides a clear summary of the project work
- Outlines clear direction for next steps / recommendations

Project Closeout and Celebrating

- Submit Finalized Version of reports and major docs to Organizational Archive.

- Sunset your Library staff Google Site.

- Send acknowledgements of project work to team and their supervisors.

- Celebrate!

Questions?