## Project: Idea to Closure

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## Agenda

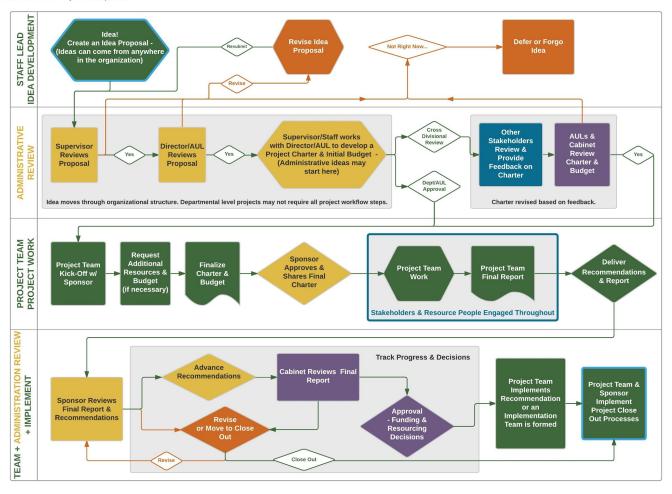
- Overview
- Proposing an Idea
- Scope & Development of Charter
- Team Member Roles &Work BreakdownStructure
- Communication
- Organizing Meetings
- Tracking Project Status
- Final Report and Closure

#### Overview

Project Management Handbook Copy for this Presentation:

<a href="https://z.umn.edu/PMHandbook">https://z.umn.edu/PMHandbook</a>
<a href="https://z.umn.edu/PMHandbook">-PMIG</a>

University of Minnesota Libraries - Twin Cities Campus From Ideas to Project Completion



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
  - o 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

#### <u>UL Project Charter template</u>

- 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

<u>Training Resource: Meetings - Setting Meeting Ground Rules Best</u> <u>Practices</u>

#### 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?