Project Management
Leveraging Efficiency and Teamwork

Participant Handouts

Project Management
Leveraging Efficiency and Teamwork

Agenda

1. What is Project Management (PM)?
2. How can PM be applied in the library setting?
3. The importance of a Project Charter
4. Project Schedules
5. Communication Plans
6. The Risk Register
7. Kick-Off Meetings
8. Team Meetings
9. Ensuring Success in Execution
10. Project Closeout
11. Tools & Resources
12. Q&A

MLA Sailboat Activity Sheet

Brian's Build-A-Deck Project Charter

Project Manager:	Seymore Efficiency	Charter Created Date:	3/2/2015
Project Owner:	Mr. Turbine Union	Charter Approved Date:	3/5/2015

1.0 Project Description

- **What is the purpose of this project?**
The purpose of this project is to build a deck at my current place of residence.
- **How will this project benefit your family?**
  - Provide a location for enjoying warm weather outdoors
  - Increase quality family time
  - Increase equity and resale value of home
- **How will you know this project is complete and successful?**
  - City approval document will be signed by city inspector
  - Contractor invoice will be paid

2.0 Project Scope

- **What is the scope of this project?**
The following items will be included in this project:
  - Assessment of proposed Location
  - Deck Design
  - Purchase of Material
  - Site Preparation
  - Construction
- **What is out of scope for this project?**
The following items will not be addressed on this project:
  - Obtaining city construction permit
  - Confirming neighborhood association rules & regulations (already confirmed)
- **What are the assumptions?**
This project assumes the following:
  - Family would appreciate and use a deck
  - A deck is preferred over a patio
  - Installation of footings and main structural construction will be outsourced

Brian's Build-A-Deck Project Charter

3.0 Project Key Deliverable Completion Dates (Milestones)

Milestone: Project Started	2013/03/02
Milestone: Project Charter Complete	2013/03/05
Milestone: Deck Design Finalized	2013/03/26
Milestone: Materials Ordered	2013/04/02
Milestone: Site Preparation Complete	2013/04/05
Milestone: Deck Construction Complete	2013/05/06
Milestone: Project Complete	2013/05/15

4.0 Project Financials

Project Budget		Comments/Notes
CAPEX	$ 500	CAPEX = Tools required to complete deck construction.
One-Time Expense	$ 4,000	One-Time Expense = Deck materials.
Labor Expense	$ 3,000	Labor Expense = Contractor costs

Note: For detailed cost calculations, see calculation spreadsheet.

5.0 Project Team Members

Core Team Members		Support Team Members	
Name	**Role**	**Name**	**Role**
Seymore Efficiency	Project Manager	Mark Cost	Bank
Mr. Turbine Union	Project Owner	Ed Vertising	Party Planning
Con Tractor	Contractor	Neighbor	Occasional Labor
Kids	Labor		
Wife	Finance		

6.0 Project Signatures

Project Owner:	
Project Manager:	

Project Charter "Rules"

Top 5

1. Be concise – Use bulleted text
2. Make it clear – Use layman terms
3. Document what the project will and *will not* cover
4. Reference it often – This should be your Constitution
5. Remind stakeholders of the project scope

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PROJECT CHARTER

Project Manager:		Charter creation date:	
Project Sponsor:		Charter approval date:	

1. Project Description

1.1. What is the purpose of this project?
1.1.1.
1.1.2.
1.1.3.

1.2. How will this project benefit my company?
1.2.1.
1.2.2.
1.2.3.

1.3. How will you know that this project is complete and successful?
1.3.1.
1.3.2.
1.3.3.

2.0 Project Scope

2.1 What is the scope of this project?
2.1.1
2.1.2
2.1.3

2.2 What is out of scope for this project?
2.2.1
2.2.2
2.2.3

3.0 Project Key Deliverable Completion Dates (Milestones)   **Date**

Milestone: Project Start	
Milestone:	
Milestone:	
Milestone:	
Milestone: Project Complete	

4.0 Estimate of Project Financials

Project Budget Estimate		Comments/Notes
CAPEX	$	
One-Time Expense	$	
Others	$	

5.0 Project Team Members

Core Team Members		Support Team Members	
Name	**Role/Function**	**Name**	**Role/Function**
	Project Manager		
	Project Sponsor		

Project Related Signatures

We hereby certify that the information presented for this initiative is accurate, and that we will execute this project according to the plan detailed within this initiative's project documentation.

Project Sponsor	**Project Manager**
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Instructions: Listen to your partner "present" their Charter. For each item comment with a "yes" or "no" followed by an explanation.

0.   General Comments

- **Is the Charter written in bulleted format?**

- **Do you feel like you understand the general concept of what the project is trying to accomplish?**

1.   Project Description

1.1.   Has the purpose of the project been clearly communicated?

1.2.   Is it clear what benefits the project will deliver?

1.3.   Have the success criteria been defined?

2.   Project Scope
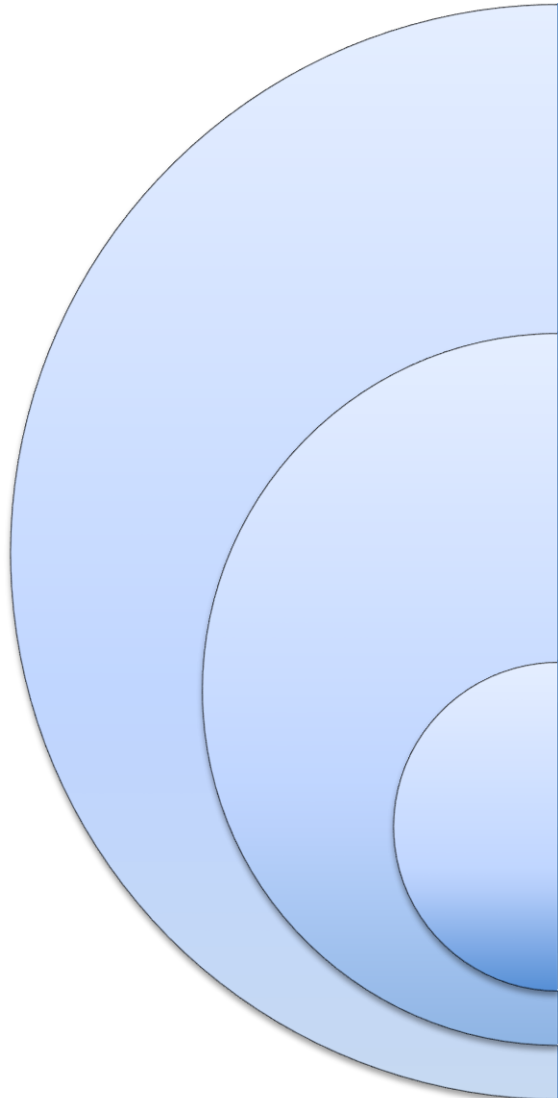
2.1.   Have the major deliverables for this project been communicated clearly?

2.2.   Have items that are <u>not</u> covered by this project been clearly communicated?

3.   Other Comments

3.1.   What other suggestions or comments do you have?

Communication Plan

< PROJECT NAME >

∗Steering Committee	• Cadence: • Duration: • Attendees:
∗Support team	• Cadence: • Duration: • Attendees:
∗Core team	• Cadence: • Duration: • Attendees:
Please refer to Project Charter for member names	

Risk Log / Risk Register

Project Name	Project Name here										Project Manager	Project Manager Name here
Project Sponsor	Project Owner Name here											
Project Documents	Location of project documents										Updated	Date of Last Update Here

ID	Risk Description	Probability	Impact	Detectability	Importance	Risk Category	Trigger Event/Indicator	Risk Response	Contingency Plan	Assigned Owner	Status	Date Entered	Risk Impact Date	Date Closed
1					0									
2					0									
3					0									
4					0									
5					0									
6					0									
7					0									
8					0									
9					0									
10					0									
11					0									
12					0									
13					0									
14					0									
15					0									

Probability:
4: Highly likely/probable (76%-100%)
3: Likely (51%-75%)
2: Somewhat likely (26%-50%)
1: Unlikely/improbable (0%-25%)

Impact:
4: Critical: Threatens the viability of the business or represents failure of the project
3: Severe: Threatens the achievement of business vision or severely reduces project benefits
2: Moderate: May delay achievement of the vision or reduce project benefits
1: Minimal/minor: No impact on business vision but may increase project costs and timescales

Detectability: When can the risk be identified or noticed?
4: Determined after impact has been realized
3: Realized upon trigger event
2: Immediately prior to trigger event; can be mitigated prior to trigger if monitored
1: Determined well in advance of occurrence or trigger event

Low = 1 - 7   Importance # = P * I * D
Medium = 8 - 26
High* = 27 - 47
Critical *= 48 - 64
* Must define Trigger event, risk response, & contigency plan

Meeting Information

Meeting Title: **Project Kick-off Meeting**   **Date:**

Bridge # / Phone #:   **Time:**

Meeting Called By: **Place:**

Purpose of Meeting: -To officially begin implementing the project

 -To ensure that all project stakeholders understand and agree with the project objectives, processes, methods, tools, roles and responsibilities, quality expectations, and success factors.

Meeting Preparation: Please read…/ bring…

Meeting Facilitator: **Meeting Scribe:**

Required*		Optional*

* Attendees in bold

Agenda Topic*	Responsible	Time
1. Team Introductions	Project Manager	
2. Business Need/Opportunity (Background)	Project Owner/Sponsor	
3. Goals, Objectives, and Scope (Charter)	Project Manager	
4. Risks, challenges and project constraints	Project Manager	
5. Project Roster	Project Manager	
6. Roles and responsibilities	Project Manager	
7. Project Workplan	Project Manager	
8. Major milestones	Project Manager	
9. Project folder use for team collaboration (H:\drive)	Project Manager	
10. Project Communication Plan	Project Manager	
11. Next Steps	Project Manager	
12. Team Commitment	Project Manager	
13. Review unresolved issues, assignments, target dates	Scribe	

* Include planned breaks

Other Information

Minutes of Meeting *(appoint someone to take the minutes prior to the meeting)*

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PROJECT CLOSEOUT REPORT

Project Manager:		Charter creation date:	
Project Sponsor:		Charter approval date:	

1.0 Schedule Actuals

Planned Project Start Date:		Planned Project Finish Date:	
Project Start Date:		Project Finish Date:	
Schedule Performance = Actual Total Weeks - Planned Total Weeks. Provide reason for variance.			

2.0 Project Scope Actuals

Actual Project Scope	Complete
Milestone:	☐
Milestone:	☐
Milestone:	☐
Milestone:	☐
Milestone:	☐
Provide reason for any incomplete or additional deliverables	

3.0 Project Financials

Planned		Actual	Variance
CAPEX	$	$	
One-Time Expense	$	$	
Others	$	$	
Provide reason for any variance.			

4.0 Lessons Learned

4.1 What went right?

4.2 What went wrong?

4.3 What could be improved?

Project Related Signatures

We hereby certify that the information presented for this initiative is accurate, and that the work for this project has been completed according to the plan that was established.

Project Sponsor	**Project Manager**
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Workshop Evaluation

Title of Workshop: Project Management – Leveraging Efficiency & Teamwork

Presenter: Brian Cole

Date: March 20th, 2015

Please rate the following items on a scale from 1 to 5 by circling the appropriate number:
1=Strongly Agree (SD); 2 = Disagree (D); 3 = Not Sure (NS); 4 = Agree (A); 5 = Strongly Agree(SA).

	SD	D	NS	A	SA
1. I felt that the workshop was well organized and the main points were well covered and clarified.	1	2	3	4	5
2. I felt that the facilitator demonstrated comprehensive knowledge of the subject matter.	1	2	3	4	5
3. The facilitator helped me to understand how the workshop material related to my own life.	1	2	3	4	5
4. I felt that the facilitator conveyed ideas effectively and clearly and the material was informative and easy to understand.	1	2	3	4	5
5. I gained usable skills and will be able to apply them to my work and/or personal life.	1	2	3	4	5

6. What was the most valuable aspect of the workshop?

7. What could have been done to improve the workshop?

8. Additional Comments or suggestions: