Project Management Case Studies:
Who Forgot to Measure the Bookcases?
February 1, 2012 – Noon to 1 pm MST

Colorado State Library, Denver, CO
www.coloradostatelibrary.org/projectmanagement
Sharon Morris – Director of Library Development
Morris_S@cde.state.co.us
#pmlibraries

With Pat Wagner, Pattern Research, Inc.
pat@pattern.com

Colorado **S**tate **L**ibrary

The Fine Print: Thanks

- Institute *of* **Museum** **and** **Library** Services
- **REACH:** Leading Learning in Libraries
- **C**olorado **S**tate **L**ibrary
  - Michelle Gebhart and Mary Beth Faccioli
- Tim Sullard, **Pattern Research, Inc.**

INSTITUTE *of* **Museum** and **Library** SERVICES

1

Reminders

- You are muted; no side chat is available.
- Only webinar staff will see the questions.
- Twitter hashtag: #pmlibraries
- We don't offer tech support, but...
     Close apps and browsers; log out and in; reboot.
- You can download the slide handout (PDF)
  and the recorded and archived webinar at:
     www.coloradostatelibrary.org/projectmanagement

2

Project Management Case Studies:
Who Forgot to Measure the Bookcases?

February 1, 2012
With Pat Wagner

Public Domain Graphic Resources

- Flickr.com
- www.instructionaldesign.org/
- totallyfreeimages.com/
- Pixabay.com
- wpclipart.com
- en.wikipedia.org/wiki/Wikipedia:
  Public_domain_image_resources

3

Next Session

Proof of Concept: Applying Project
Management Principles to Your Workplace

February 15, 2012 - Noon to 1 pm MST

Deadline for submissions: February 10, 2012

www.coloradostatelibrary.org/projectmanagement

4

What Next?: February 10th

Try something new, and tell us:
1. What did you do?
2. What impact did it have?
3. What will you do next?
Simple doc: pat@pattern.com
1. One simple sentence or bullet per item.

5

Homework for February 10

1. Writing and sharing benchmarks in simple language
2. Setting benchmarks and deadlines to evaluate how long tasks really take
3. Deciding how "good" something should (or can) be
4. Writing one daily, personal goal to help stay focused
5. Choosing things to stop doing, either temporarily or permanently
6. Sorting priorities

6

Homework Examples

Wrote three goals for my group.
Discover everyone had different goals.
Together establish same goals for entire group.

Measured how long it takes to check in periodicals
Horrified: 20 hours per week to save $10 a year
Stop checking in periodicals; will buy replacements

Wrote one goal to accomplish each day
Made me conscious of how many sidetracks I take
Will share goal with office mate to help me keep on track

7

Pat Wagner

- 30+ years w libraries as trainer and consupt
- Learned PM on the job:
  Very public deadlines:
  - Printing and publishing projects
  - Theater: Curtain up, no matter what.
  - Radio: 1/100 sec.
- ALA, ACRL, SLA, MLA

8

Agenda

- Objectives
- Stories of project management:
  Mistakes, misunderstandings, disagreements
- Homework guidelines
- Resources
- Connections

9

Objectives

- Practice project management thinking.
- Identify "soft spots" in your projects.
- Apply specific improvements.
- Proof of concept: Evaluate changes?
- Test new ideas: Try something different.

10

Stories

- The Bookcase Fiasco
- The Imaginary Logo
- The Missing Boxes
- The Angry Employee
- The Hidden Contract

- The Missing Bosses
- The Printing Bid
- The Forgotten Speaker
- The Credit Check
- The Wrong Change

11

The Bookcase Fiasco

Eighteen months of discussions, and the
location of the new fiction collection was
resolved. The bookcases were ordered,
and the collection pulled out of tech services.

*Too bad no one bothered to measure
the size of the collection.*

12

The Imaginary Logo

The marketing committee was eager to
stay proactive. After they met with the
programming committee, they spent six
months designing the campaign for the
carnival.

*Too bad the programming committee had
cancelled it five months and two weeks ago.*

13

The Missing Boxes

Funding for the new library building was
approved. However, as the janitor pointed
out, no one had thought about the logistics
of moving the contents of Building A to
Building B.

*What boxes do we buy, who pays for them,
and where do we store them?*

14

Project Management Case Studies:
Who Forgot to Measure the Bookcases?

February 1, 2012
With Pat Wagner

The Angry Employee

The longtime employee, with a slew of problems, was terminated, with some drama. However, the library was not expecting revenge:

A destroyed database, thousands of dollars of office supplies ordered, and a speaker hired for a program that did not exist.

15

The Hidden Contract

For years, the contract between the city and county for library services had been quoted by library directors, newspaper editors, lawyers, and elected officials.

Too bad it did not exist.

16

The Missing Bosses

No one was trained in project management, no one allowed to drop projects, no money was budgeted, and everything stopped when the managers left for conferences.

The staff was conscientious, and the project was still three and one-half years late.

17

Project Management Case Studies:
Who Forgot to Measure the Bookcases?

February 1, 2012
With Pat Wagner

The Printing Bid

The director was stressed out–no time for important work. She was stuck writing a major bid for printing. She was upset. Complained a lot to her staff:

Executing a lengthy financial project that her competent clerk was trained to handle.

18

The Forgotten Speaker

The committee was jazzed; they had all agreed that Ms. Pat was the ideal person for the ALA division keynote at the annual conference.

Too bad no one thought to ask Pat. [Luckily, a friend told her she was listed in the conference schedule.]

19

The Credit Check

Fourteen years. $150,000. Gone. The director claimed that it was just a bookkeeping mistake. A loan to be paid back. A big surprise: But…

Too bad no one ran a $50 credit check or hired an outside accounting firm to audit the books, despite the expense.

20

Project Management Case Studies:
Who Forgot to Measure the Bookcases?

February 1, 2012
With Pat Wagner

The Wrong Change

The library user paid the fine with a $20 bill, and claimed that the staff member shortchanged him on purpose. No witnesses. Also, no policies in place. The library "paid off" the user.

Too bad a good employee was accused of theft because there was no plan.

21

Mistakes in Common

What do these stories have in common?
– People made assumptions.
– No one was the point person.
– Stuff was not written down, and shared.
– No one had the big picture.
– There was no plan.

22

What Next?: February 10th

Try something new, and tell us:
1. What did you do?
2. What impact did it have?
3. What will you do next?

Simple doc: pat@pattern.com
1. One simple sentence or bullet per item.

23

Project Management Case Studies:
Who Forgot to Measure the Bookcases?

February 1, 2012
With Pat Wagner

Homework for February 10

1. Writing and sharing benchmarks in simple language
2. Setting benchmarks and deadlines to evaluate how long tasks really take
3. Deciding how "good" something should (or can) be
4. Writing one daily, personal goal to help stay focused
5. Choosing things to stop doing, either temporarily or permanently
6. Sorting priorities

24

Homework Examples

Wrote three goals for my group.
Discover everyone had different goals.
Together establish same goals for entire group.

Measured how long it takes to check in periodicals
Horrified: 20 hours per week to save $10 a year
Stop checking in periodicals; will buy replacements

Wrote one goal to accomplish each day
Made me conscious of how many sidetracks I take
Will share goal with office mate to help me keep on track

25

Resources

- *Getting Things Done, David Allen*
- *The One-Page Project Manager, Clark A. Campbell*
- *The E-Myth Revisited, Michael Gerber*
- *The Goal, Eliyahu Goldratt*
- *Becoming a Manager, Linda Hill*
- *Results without Authority, Tom Kendrick*
- *Breaking Roberts Rules, Lawrence Susskind*

26

Project Management Case Studies:
Who Forgot to Measure the Bookcases?

February 1, 2012
With Pat Wagner

Connections

- *pat@pattern.com*
- LinkedIn: Pat Wagner
- Twitter: *pat2pattern*
- Facebook:
  – Pat Wagner
  – Pattern Research, Inc.
- Librarything: *patternresearch*

27

Questions?

While we wait for your questions, we would
like to hear from you about today's webinar.
Please complete the survey for this session.

http://www.surveymonkey.com/s/W9G3HVV

We will send you an e-mail with a link as well.

28