HEALTHY MUSEUMS, THRIVING CAREERS

Mastering Project Management Essentials

What’s your experience with project management?
INTRODUCTIONS
KALIE SACCO
ksacco@astc.org

Director of Member Strategy
Association of Science and Technology Centers (ASTC)

- Strategy development, events, cross-functional collaborations
- Enhancing organizational culture
- Promoting accountability
LIZ MCDERMOTT
lmcdermott@getty.edu

Head, Digital Media & Content Strategy
Getty Research Institute

- Team leader and facilitator
- Narrative storytelling and strategic engagement
- Change management
JOHN SHAW
john@museumexp.com

Principal
Museum EXP

- Exhibition development
- Event management
- Internal projects (web/marketing)
- Product development (merch!)
BARBARA PUNT
barbara@puntconsulting.com

President
Punt Consulting Group

- Project Management
- Owner’s Representation
- Selection processes (RFP/RFQ)
- Contract negotiation and management
DEAN BRIERE
briered@azscience.org
www.linkedin.com/in/dean-briere

SVP, Strategic Projects
Arizona Science Center

- Project Management
- Exhibition Development
- Systems Enhancement
- Strategic Planning
UMA NAIR
uma@umanairconsulting.com

Founder
The Strategic Museum

- Workload & Project Management
- Strategy Implementation
- Technology and Process Optimization
- PM Training for Arts & Culture Professionals
What's your experience with project management (select all that apply)

Click Present with Slido or install our Chrome extension to activate this poll while presenting.
WHY DOES PROJECT MANAGEMENT MATTER?

It helps ensure that projects reach the necessary quality by balancing budget, time constraints and scope.
PROJECT MANAGEMENT

Getting other people to \textbf{WANT} to do what you \textbf{NEED} them to do
BEFORE “PROJECT MANAGEMENT” EXISTED...
BEFORE “PROJECT MANAGEMENT” EXISTED...
BEFORE “PROJECT MANAGEMENT” EXISTED...
BEFORE “PROJECT MANAGEMENT” EXISTED...
BEFORE “PROJECT MANAGEMENT” EXISTED...
When did formal project management start?
MATRIX MANAGEMENT STRUCTURE

**Green:** Project manager

**Yellow:** Team members

**Blue:** Department heads
OVERVIEW TERMS & TOOLS
IN THE MUSEUM CONTEXT

ROLES
PROCESS
SCOPE
TIMELINE
TOOLS
ROLES

Project Manager versus Project Sponsor

**PROJECT SPONSOR**
- Champion of overall success
- Financing & Resources

**PROJECT MANAGER**
- Oversee day-to-day
- Manage team & tasks
- Track project progress

**PROJECT TEAM MEMBERS**
- Conducts project work
- Communicates with Project Manager
ROLES

Stakeholder: Anyone with an interest in your project's outcome.
ROLES

Project Management Office

Group or department that sets project management process and standards within the organization. Coordinates and prioritizes across projects.
PROCESS

Project Charter

- Lays out purpose and broad roles
- Internally “market” and get buy-in
- Act as a touchstone
  - Prevent scope and stakeholder creep
  - Stick to broad schedule
**Stakeholder Analysis**

**Goal**
- Understand their perspective
- Secure support throughout project

**Methodology**
- Interviews
- Brainstorming

**Understanding their perspective**
- What is important to them?
- How could they contribute?
- How could they pose challenges?

**Next Steps**
- Analyze data
- Engagement and communication strategy
What is a RACI?

**Responsible:** Executes the task

**Approver:** Signs off at key milestone points; the final approving authority

**Consulted:** Provides input and feedback; two-way communication

**Informed:** Kept updated on status or progress, often only on completion of deliverable/at milestones; one-way communication
What are the benefits?

1. Shared understanding
2. Clarity of roles and requirements
3. Empower staff and Subject Matter Experts
4. Enable leadership to own their role and expertise in your organization.
Responsibilities – RACI Matrix

Tool that identifies roles and responsibilities against phases/deliverables within a project

**Project: Baking a cake for Liz’s birthday party**

<table>
<thead>
<tr>
<th>Deliverable/Phase</th>
<th>Jackie</th>
<th>Liz</th>
<th>Megan</th>
<th>Khristaan</th>
<th>Mary/Andrew</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selecting cake recipe</td>
<td>Responsible</td>
<td>Approver</td>
<td>Consulted</td>
<td>Informed</td>
<td>Informed</td>
</tr>
<tr>
<td>Baking cake</td>
<td>A/R</td>
<td>I</td>
<td>R</td>
<td>I</td>
<td>I</td>
</tr>
<tr>
<td>Sending invites</td>
<td>R</td>
<td>A</td>
<td>C</td>
<td>C</td>
<td>I</td>
</tr>
</tbody>
</table>
PROCESS

Budget

- Setting the budget
  - History
  - Experts
  - Funding
- Budget tracking & reconciliation

BUDGET ➔ $ SPENT & COMMITTED ➔ PROJECTED
SCOPE

[Image of a shed with a diagram showing Quality, Schedule (Time), and Budget (Cost)]
SCOPE  VALUE  ENGINEERING

“GOLDILOCKS”
“Value Engineering” to get back on budget

- Not engineering in the usual sense
- Refers to “systemized and organized approach to providing the necessary functions at the lowest cost”
- Best use of funds to accomplish your goal
- **Can help balance the “triangle” to bring scope, schedule, and budget into balance**
The PM’s GPS for Project Navigation

A schedule should have
1. Tasks
2. People assigned to each task
3. Milestones
4. Deliverables at each milestone
5. Duration for each task
TIMELINE

Making an Effective Project Schedule

Work Breakdown Structure (WBS) Simplified
- Assign deliverables to each task
- Sequence the tasks & deliverables
- Identify dependencies and concurrent tasks
- Identify milestones
- Assign people to tasks based on skill sets
- Estimate duration for each task
- **Work Does Not Equal Duration**
TIMELINE

Gantt Charts

Graphic representation of a project timeline

- Advantages:
  - Actively monitors progress
  - Shows linkages
  - Provides accountability
TOOLS

Project Management Software

Many free or affordable options!

- **Asana**
  - Highly collaborative
  - Ideal for small to mid-size teams

- **Trello**
  - Good for visual learners and product development

- **Monday**
  - Great for larger teams
HOW DO YOU LEARN PROJECT MANAGEMENT?

SELF TAUGHT
ON THE JOB
FORMAL TRAINING
TWO ASPECTS OF PROJECT MANAGEMENT

Subjective
How do you get people to \textit{WANT} to do what you \textit{NEED} them to do? (other than begging or plying with food?)

Figure out what \textit{motivates} them!

Objective
Convince with tools, putting their work in the context of the bigger picture of the whole project (using budgets, schedules, and/or contracts)
TWO ASPECTS OF
PROJECT MANAGEMENT

Improve your **subjective** techniques

- Observe others good at managing people and projects. Pay attention to how they work the room in meetings.
- Read up on negotiation skills, team management, art of persuasion

Improve your **objective** tools

- Consider taking courses
- Master the basic trinity of tools: budgets, schedules and contracts
PROJECT MANAGEMENT

FORMAL TRAINING

- Courses
  - Higher Ed (check out extension programs)
  - MOOCs
- Project Management Book of Knowledge (PMBOK)
- PMP certification
BENEFITS OF PROJECT MANAGEMENT

Enhances teamwork:
- Ability to work on separate parts of a larger whole
BENEFITS OF PROJECT MANAGEMENT

Enhances teamwork:
- Ability to work on separate parts of a larger whole

Improves communication:
- One person tasked with ensuring information gets to right people
BENEFITS OF PROJECT MANAGEMENT

Enhances teamwork:
- Ability to work on separate parts of a larger whole

Improves communication:
- One person tasked with ensuring information gets to right people

Improves accountability
- One person responsible for tracking process

Images courtesy of Dreamstime and Clearpoint Strategy
APPLYING PROJECT MANAGEMENT TO YOUR ORGANIZATION

- Internal vs. external consultant (and how do you decide which one to use)
- Setting organizational understanding and shared goals around project management
Introductions (5 mins total)

CASE STUDIES

★ Six case studies in 12 minutes!
★ Afterwards, pick a type of case study to discuss with your colleagues and one of the presenters at a round table
★ All questions and comments welcome
CASE STUDY 1:
Using Project Management for Strategy

The Challenge
- A complex, multi-missioned organization that had never had a strategic plan
- Needed a way to encourage cross-functional work and address big challenges
- Didn’t have a PMO or dedicated project manager

The Solution
- PM strategies to bring order to the chaos
- Stakeholder mapping
- Community-driven mindset
- Transparency in the process
CASE STUDY 2:
Exhibit Design and Fabrication

The Challenge

- Create an interactive and informative exhibition with a limited budget that meets stakeholder and visitor expectations.
- Limited internal resources

The Solution

- Budget planning and management
- Schedule management
- Convening a project team and stakeholders
- Creating contracts that avoid scope gap
Your Project Team

MUSEUM EXPO

MUSEUM LEADERSHIP

PROJECT STAKEHOLDERS (BOARD, FUNDERS, ETC.)

PROJECT MANAGER

COMMUNITY LIAISON & DEAL EXPERT

CONTENT DEVELOPER

SUBJECT MATTER EXPERTS
ARCHIVISTS
EXHIBIT RESEARCHER
MEDIA PRODUCER

COLLECTIONS MANAGER & REGISTRAR

CREATIVE DIRECTOR & EXHIBIT DESIGNER

GRAPHIC DESIGNER

EXHIBIT FABRICATORS

EXHIBIT VENDORS

MOUNT MAKER
CASE STUDY 3:
Project Management Mindset within an Organization
Dean Briere, Arizona Science Center

The Challenge
1. A new strategic plan with a large number of projects over the next 5 years
2. A green staff with more than 75% being at the organization less than one year
3. A senior team stretched with new initiatives with a focus on deliverables and process rather than outcomes and results
4. No formal project management structure within the organization

The Solution
- Create PMO
- Design and standardize PM processes
- Define and communicate roles
- Define programs and projects
- Resources management
- PM tool
Challenges

- A new strategic plan with a large number of projects over the next 5 years
- A green staff with more than 75% being at the organization less than one year
- A senior team stretched with new initiatives with a focus on deliverables and process rather than outcomes and results
- No formal project management structure within the organization
Talented and Capable Team

Skilled coordinators
Worked hard
Great ideas
Passionate
Can-do attitude
Successful in spite of our project management “skills”, not because of them
Self aware - WE CAN DO BETTER!
Arizona Science Center (ASC) does not currently have a Project Management Office, or official Project Managers. All projects are managed via the existing staff who are also running the day-to-day business. This has resulted in ‘Ad Hoc Project Management' status.
What is going well (April 2023, PMO Squad Assessment)

- Organization developed a Strategic Plan for the business and added stakeholders to the planning process.
- Organization has a Wall of Work (WoW) tied to their strategic plan.
- Very dedicated staff, committed to doing whatever it takes for the organization to be successful.
- Senior Leadership is advocating for and supporting the need for implementing best practice project management to improve overall efficiency and effectiveness of what the Science Center delivers.
Areas of Opportunity  (April 2023, PMO Squad Assessment)

- PMO Organization: No PMO, trained and/or dedicated Project Managers or project management processes. Definitions: What is a Project? – undefined
- PM Processes are not consistent or standardized. Projects are not sufficiently defined and Resources are not efficiently assigned to deliver the work. Duplication of effort across the organization causing lack of efficiency; project roles and responsibilities are not defined/unclear across the organization.
- PM Tools: no source of truth with multiple tools and methods used to manage projects (Google Sheets, Monday.com, etc.)
# Findings and Recommendations (PMO Squad July 2023)

## Starting Point - Stage Zero - No PMO

<table>
<thead>
<tr>
<th>Current State</th>
<th>Finding Details</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong> PMO Organization: no PMO</td>
<td>• Org does not yet exist (roles or HC)</td>
<td>• Org structure define the appropriate level of PM roles and staffing needed and hire appropriately</td>
</tr>
<tr>
<td></td>
<td>• No formal Project Manager’s</td>
<td>• Project Manager titles should be eliminated outside of the new PMO to avoid org confusion</td>
</tr>
<tr>
<td><strong>2</strong> PM Processes &amp; Communications: not consistent or standardized</td>
<td>• No standardized Project Management processes, based on industry standard best practices</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Projects and not defined</td>
<td>• Define and standardize PM processes based on industry standards</td>
</tr>
<tr>
<td></td>
<td>• Resources are not efficiently assigned to deliver the work</td>
<td>• Define and communicate each ASC role in the project lifecycle (Idea through Delivery)</td>
</tr>
<tr>
<td><strong>3</strong> PM Tools: no source of truth</td>
<td>• No single source of truth with multiple tools and methods used to manage projects (Google Sheets, Excel, Monday.com, etc.)</td>
<td>• Define Programs &amp; Projects, the Project Delivery Lifecycle and Portfolio Management Model</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Build &amp; Implement Resource Management, based on business priorities and available capacity.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PPM Tool selection and implementation</td>
</tr>
</tbody>
</table>
Moving to Better Project Delivery

THE PROJECT MANAGEMENT JOURNEY

01 Ad Hoc Project Management
6 months

02 Standardizing Project Delivery
1 - 2 years

03 Organizational Project Delivery
3 - 5 years

04 Strategic Project Delivery
6 - 8 years

05 Generating Value
9 - 10 years
Implementation Roadmap

- Define Your PMO’s Purpose
- Design Your PMO’s Org Structure
- Define PM Roles & Responsibilities

Build PMO Organization

- Define Projects & Programs
- Build PMO Playbook (Delivery Framework)
- Build Resource Management Playbook

Build PMO Processes
Implementation Roadmap

- Tool Selection
- Tool Implementation
- Build Reporting and Analytics (Portfolio, Programs, and Projects)

PM Tool and Reporting

- Resource Forecasting
- Resource Management (Capacity vs. Demand)

Implement Enterprise PM Processes
Organizational Buy In

Involvement throughout the process
Adapt process to the team
Selection of the appropriate tool
Training
Listening
Evaluating
Showing success
CASE STUDY 4:
Using Project Management to Tackle Workload

The Challenge

Intense workload and staff shortage
1. Ad Hoc Requests
2. Difficulty with External Stakeholders
3. Lack of Diversity & Inclusion in the Work

The Solution

- Clear Vision and Mission
- Detailed Criteria and Guidelines
- Standardized Process and Governance
CASE STUDY 4: Using Project Management to Tackle Workload

The Process

1. **Develop clear vision, mission, and alignment.**
   Stakeholder Research, Market Research, SWOT Analysis, Capacity Audit

2. **Define priorities, criteria, and guidelines.**
   Market Analysis, Stakeholder Analysis, Development of Criteria, Approval, Documentation, Communication.

3. **Develop standardized process and governance plan.**
   Step-by-Step Work Breakdown, Role Assignment, Scheduling, Documentation, Communication.

4. **Implement the new work plan.**
   Communicate, Listen, Adapt
CASE STUDY 5:
Working with an External vs. Internal Project Manager

Barbara Punt
President
Punt Consulting Group

There’s not a one size fits all solution
● In house staff
● External consultant
● Hybrid model
Internal pm:
California Science Center

- Large capital project
- Curatorial staff needed to focus on content
- Needed someone with expertise in exhibit design and fabrication in conjunction with new construction, as well as exhibit infrastructure required to support a building over time
- Beyond the scope and expertise of current staff, so created new position
External pm:
Roseville Utility Exploration Center

• City agency wanted outside expert in pm, specifically with capital projects
• Needed someone with expertise in exhibit design, fabrication, and managing outside designers’ work w/ internal staff
• Beyond the scope and expertise of current staff
Hybrid model of pm: Connecticut Science Center

- Planned 6 gallery updates over 4 years
- Staff inexperienced at project management
- Hired me to manage initial 3 gallery updates
  - **Trained current staff** to manage future capital projects
- **Available on call** for any advice or troubleshooting needed
CASE STUDY 6:

Managing Stakeholder Involvement

Challenge

- Too many cooks in the kitchen
- Risk of conflicting priorities, delays, and communication breakdowns

Solution

- Assign clear roles and responsibilities
- Establish communication pathways to streamline decision-making and collaboration
GROUP DISCUSSION

1 PM FOR STRATEGY – KALIE
2 EXHIBIT DEVELOPMENT – JOHN
3 PM WITHIN AN ORGANIZATION – DEAN
4 PM TO TACKLE WORKLOAD – UMA
5 EXTERNAL VS. INTERNAL PROJECT MANAGER – BARBARA
6 MANAGING STAKEHOLDER INVOLVEMENT – LIZ
WRAP UP

TAKEAWAYS FROM DISCUSSIONS

HAND OUTS – PROJECT MANAGEMENT TOOLS
THANK YOU!

Project Management Templates
CONTENT

01  ABOUT US
02  OUR TEAM
03  STRATEGY
04  OUR SERVICES
05  EXPERIENCE
06  QUARTER
07  NEXT PROJECT
THANKS FOR WATCHING

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis vulputate nulla at ante rhoncus, vel efficitur felis condimentum. Proin odio odio.
NEXT PROJECT

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis vulputate nulla at ante rhoncus, vel efficitur felis condimentum. Proin odio odio.

PROJECT 1

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis vulputate nulla at ante rhoncus, vel efficitur felis condimentum. Proin odio odio.

PROJECT 2

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis vulputate nulla at ante rhoncus, vel efficitur felis condimentum. Proin odio odio.

PROJECT 3

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis vulputate nulla at ante rhoncus, vel efficitur felis condimentum. Proin odio odio.
CONCEPT IN BUSINESS

- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis vulputate nulla at ante rhoncus, vel efficitur felis condimentum. Proin odio odio.

- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis vulputate nulla at ante rhoncus, vel efficitur felis condimentum. Proin odio odio.
OUR TEAM
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis vulputate nulla at ante rhoncus, vel efficitur felis condimentum. Proin odio odio.