

Community Building Summit

Red Lion Hotel, Boise

April 29 and 30, 2015

Presented by Pat Wagner, Pattern Research, Inc.



Handout for April 30 *Project Management*

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Resources

- Nathaniel Branden. How To Raise Your Self-Esteem.
- Marcus Buckingham & Curt Coffman. First, Break All the Rules: What the World's Greatest Managers Do Differently.
- Clark A. Campbell. The One-Page Project Manager: Communicate and Manage Any Project With a Single Sheet of Paper
- Gavin De Becker. The Gift of Fear.
- Roger Fisher and William Ury. Getting to Yes: Negotiating Agreement Without Giving In.
- John Gastil. Democracy in Small Groups: Participation, Decision Making & Communication.
- Dick Grote. Discipline Without Punishment: The Proven Strategy That Turns Problem Employees into Superior Performers.
- Elliott Jaques. Executive Leadership: A Practical Guide to Managing Complexity.
- Tom Kendrick. Results Without Authority: Controlling a Project When the Team Doesn't Report to You.
- Joan Magretta and Nan Stone. What Management Is: How It Works and Why It's Everyone's Business
- Patrick J. McKenna and David H. Maister. First Among Equals: How to Manage a Group of Professionals.
- Roger K. Mosvick and Robert B. Nelson. We've Got to Start Meeting Like This: A Guide to Successful Meeting Management.
- Stanley Portney. Project Management for Dummies.
- Project Management Institute. A Guide to the Project Management Body of Knowledge.
- Karen Pryor. Don't Shoot the Dog: The New Art of Teaching and Training.
- Claire Raines and The Art of Connecting: How to Overcome Differences, Build Rapport, and Communicate Effectively with Anyone.
- Virginia Satir. The New Peoplemaking.
- Eric Verzuh. The Fast Forward MBA in Project Management: Quick Tips, Speedy Solutions, and Cutting-Edge Ideas.

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Quick, Cheap & Decent Strategic Planning

Why even the smallest, poorest, newest, oldest, richest, and most successful libraries all need a strategic plan.

1. Creates a written contract for making decisions.
2. Replaces personality cults with written agreements.
3. Reduces micromanagement by board, director and staff.
4. Provides objective criteria for evaluations
5. Gets everyone on the same page: saves time and money.
6. Everyone has the same information: transparency promotes trust.
7. Creates a contract between director and board: accountability.
8. Creates criteria for decision-making: Does it support the plan?
9. Moves the library forward to a new destination.
10. Stays relevant to the community it serves.
11. Eliminates pet projects.
12. Establishes new goals for everyone: Everyone grows.
13. Establishes a consistent plan for change.
14. Why does the library have to change?
 - a. Culture and society are changing.
 - b. Technology is changing.
 - c. The current library users are changing.
 - d. Potential library users are changing.

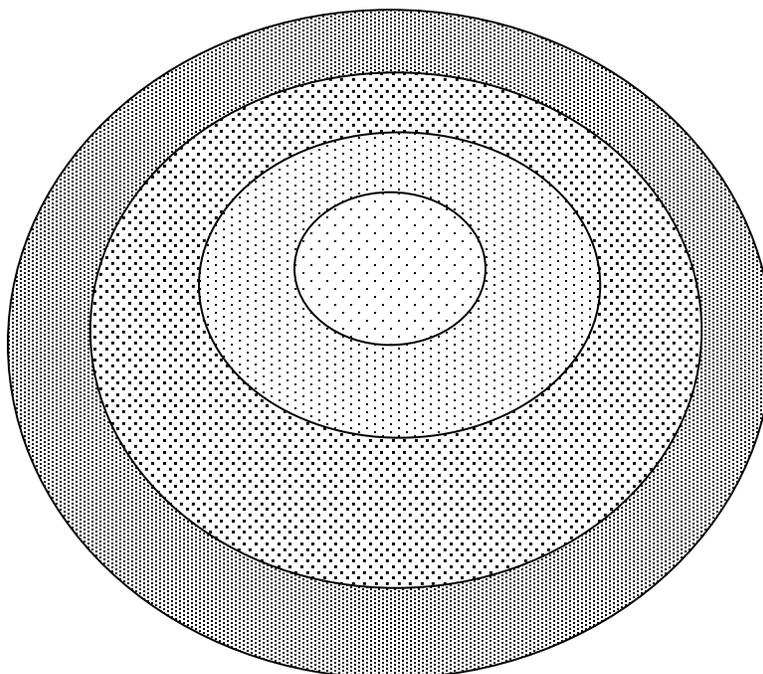
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The Target Audience in Your Community

Who are you trying to reach? Who is at the center of the target?



1. Identifying a specific target audience helps make choices, so we have rational ways to decide among dozens of different variables, from what color to use on the brochures to where to hold an event.
2. Using a target audience and specific, related topics and issues creates a “handle” to help the library’s community members grab on to who you are and what you have to offer them. The more specific, the better you can influence everyone outside the target.
3. A target becomes a “mirror” where the potential customers can see themselves in the language and images used.
4. A target starts with one person and then flows out to larger audiences with less focus. One facet or aspect of the target can reach many more people.

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The Target Person – A real human being

The Avatar

1. Exact age/gender/name.
2. Family status: Whom they live with and, if applicable, are responsible for.
3. Occupation or school status: What they “have” to do.
4. Exact level of formal education.
5. Exact income: earned, retired, etc.
6. Exact home address: zip code, neighborhood, type of abode,
7. Socioeconomic status: working class, trust fund “baby”, working poor.
8. Any health, cognitive, or physical mobility issues.
9. Cultural markers: ethnicity, language, place of birth, cultural identity.
10. Lifestyle: What they do for fun.
11. What are four typical problems they are trying to solve in their lives?
12. How could the library help them solve these problems?
13. Where and how do they learn what do with their time and money?
14. How could the library reach them with print media? What choices do you have?
15. How will you involve the target audience in the marketing process?

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Mastering the Supervision/Management Map

Leadership skills and point of view: Anticipate change
(Vision, risk, influence, character)

Change, creation, external collaboration with other decision-makers, marketing, command decisions, investment, sales. Champions. The mission. The biggest picture. Politics. Long-range planning (more than two years out). Risk and the future. The telescope. Dream. The principles. Where are we going, and Why? The destination. The scout. Community relationships. The heart and brain. (Danger: Out of touch!) Watch out for loose cannons, lone eagles and elitists!

Managerial skills and point of view: Maintain the system
Pause. Step back. Check in.
(Communicate, coordinate, translate)

Organize people, ideas, and projects. Coaches. Mentors. Resource allocation. The pause button. The bigger picture. Elicit the best from people. Consistency. The camera. Watch and listen. Systems, rules, policies, structures. Budgets, schedules, department-level problem-solving. Benchmarks. The goals and strategies. Write it down. Meetings and committees. What? Voice and skeleton. (Danger: The rules become the goals.) Watch out for bureaucrats, list-makers and micromanagers!

Task skills and point of view: React to the moment
(Professional, technical, clerical, support)

Details, autonomy, right in front of me. Teaches. Short time horizon. Focus on the present. Take action. The tactics. The eyes, ears and hands. The microscope. Feedback. Quick fixes. Procedures. How? Act. Direct interaction with co-workers and library users. (Danger: The only “real work”.) Watch out for perfectionists and lurkers.

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Mastering Project Management

Please give yourself a score of 1 to 10 for each of these statements. Which have you improved since you first started working?

1. ___ I keep track of information.
2. ___ I make eliciting the best from others my first priority.
3. ___ I think and write before I act.
4. ___ I like to build teams and delegate.
5. ___ I receive satisfaction from the success of others.
6. ___ People like to work for me because we get things done.
7. ___ I can increase most people's productivity.
8. ___ I think about how the library's departments interact.
9. ___ I communicate the bigger picture every day.
10. ___ I am good-humored and effective under stress.
11. ___ I am able to impose consistent, humane, and appropriate consequences in a timely fashion, including disciplining and firing people as needed.

How could you improve your scores?

What to Accomplish:
Sorted Goals

What to Accomplish:
Sorted Goals

What to Accomplish:
Sorted Goals

CONSTRAINTS

How
STYLE

CONSTRAINTS

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The Importance of Precision

Respect, and other words that have no meaning

One skill required to ensure effective communication is the ability to talk about specific behavior in a precise manner. For example, many people who are unhappy about how they are being treated by their supervisors will say they want “respect”. By using the word “respect,” they are not giving the other party specific information. Here are some specific requests for “respectful” behavior.

1. “I want you to address me by my name, instead of ‘Hey you!’”
2. “I want to be introduced to visitors to the library.”
3. “I want to be invited to budget meetings at least once a month.”
4. “I want to have your attention without your interrupting our conversations in your office to take phone calls.”
5. “I want you to let me finish my sentences.”
6. “I want to see some of my ideas implemented or know the reasons why they not being used.”
7. “I want to be included in decision-making that affects my job.”
8. “I want to be asked to stay late, not told.”
9. “I want the rules to apply to everyone in the library equally.”
10. “I want you to be quiet and look at me when I am giving presentations in team meetings.”
11. “I want a turn running staff meetings.”
12. “I want you to give me criticism about my work in private, not in front of my team members.”
13. “I want you to say hello to me every day.”
14. “I want to be given more difficult projects.”

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Sensory–Specific Details

Pick an intangible “attitude” for your small group to work on that you want someone to demonstrate in a workplace such as:

- Good work ethic
- Service-oriented
- Professional
- Team-oriented
- Leadership
- Work-appropriate
- Supportive

Please describe how exactly a library employee might demonstrate that would indicate to the average observer this attitude. For example, if you wanted someone to demonstrate that he or she was a leader, you might ask them to volunteer to run for office in the state library association or medical library association chapter. Each person should write at least five examples, and then compare and discuss with your small group members what you wrote. The behavior should be based on something you could see or hear, not what the person thinks or feels.

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The Foundations of Project Management

Please score each item as it applies to your library on a scale from one to ten, corresponding to from never to always. You can use a number grade more than once.

1. ____ Everyone is treated like a peer by everyone else. (It is part of the culture of the library that everyone says good morning, please and thank-you to everyone with good will, no matter what their relative position.)
2. ____ Clear expectations are communicated during the recruitment, hiring and evaluation process, and the time and effort are made to verify that new hires do understand their job. No one has to guess what is required to succeed.
3. ____ Policies and procedures are written down, and everyone has their own copy. “If the plan is in your head, there is no plan,” is taken seriously.
4. ____ Everyone gets the same information at the same time, regardless of his or her position in the library. No one is allowed to hoard information.
5. ____ Everyone knows who makes decisions, what decisions they get to make, and how decisions are made. Transparency breeds trust.
6. ____ Everyone has the opportunity for input and to receive feedback about why their ideas were accepted or rejected.
7. ____ Everyone has the opportunity for leadership on committees and collaborative projects.
8. ____ Decisions that arise from meetings are communicated to everyone within 24 hours after the meeting. Communication to staff is the number one priority.
9. ____ Everyone receives continual (at least twice a year) training on management and supervisory skills, as well as cross training in technical and professional skills. Supervisors and managers are coached and evaluated on their success managing people, not just on their technical and professional skills.

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10. ____ Managers know the difference between oversight and micromanagement; as long as employees accomplish their goals within the appropriate parameters of time, quality, cost and civility, how they do it is up to them.
11. ____ Everyone is evaluated regularly on both productivity and workplace civility, with no exceptions for status, tenure, credentials, etc. (Everyone is expected to do the job well and treat each other well, even if they have tenure, are in a union or have worked at the library for 35 years. Bullies are dealt with swiftly.)
12. ____ Feedback is given as constructive criticism: what needs to happen “right” next time instead of what happened “wrong” last time (negative criticism, blaming, lecturing about past mistakes).
13. ____ Positive reinforcement (sincere, specific workplace praise) is experienced at a ratio of better than 5-to-1 in most interactions with supervisors as compared to complaints about behavior. (Employees expect that most interactions with supervisors will be realistically positive.)
14. ____ Everyone has experienced sincere specific workplace praise at least once in the last week from a supervisor or manager. (Employees expect that most interactions with supervisors will be realistically positive.)
15. ____ There is a healthy, effective mechanism in place for quickly resolving stalemates among employees and managers, and it is used. (A disagreement between people is resolved within days and the work moves forward.)
16. ____ Everyone is expected to learn and grow.

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Examples of Checkpoints

Checkpoints are ways to determine if a project is on track and to communicate possible problems so that other work is not compromised. It means that project team members are not allowed to wait until the last minute to finish the bulk of the work.

Checkpoints:

- Create the timeline for the project.
- Require specific information, not just “everything is fine.”
- Require at least one default, if it is not met.
- Prevents the project leadership from relying on one person or resource.
- Are created in the planning session.
- Help guarantee communication among team members.
- Reduce negative emotions.
- Anticipate unexpected problems.
- Assume that everyone makes mistakes.
- Are set to allow for enough time to fix mistakes and change course.

Examples of checkpoints:

“By Friday at 4 pm, I want to have the first 500 word draft of the report to the library’s governing board on my desk. If you e-mail it, please check that I have received it before you leave for the day. If the draft is not ready, I will give the project to Martha to complete.

“Monday morning at 9am we will meet to discuss the latest figures on the fundraising campaign for the literacy program. Please bring the current list of donations, including those checks and credit card charges that have not been deposited and all of the signed pledge cards we have received in the mail or collected at events so far, whether or not the person has fulfilled the pledge. If you are not at the meeting with the right information, the report to the executive committee will be delayed and our committee will not receive that extra person we were counting.

Please call me at 2 pm and tell me how many of the new local historical reference books have been processed and are ready to send to the branch libraries. We have had reports that some of the books were damaged in shipping. Please send me a list of what you think we need to return by the end of the day. If the list is not sent to the distributor by Friday, we will not receive credit for the damaged books and it will cost our book budget an extra \$356.

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Examples of Benchmarks (Goals, Outcomes, Results)

Descriptive benchmarks are often anecdotal and refer to what we can see and hear.

- Library users are heard complimenting the new library.
- Students are seen using the library after hours.
- All of the chairs are filled and the copier is always busy..
- Seniors are seen teaching each other the new computer system.
- More intergenerational groups form around the computers.
- Reference librarians are seen walking around and offering assistance.
- More staff members are asking for responsibility for marketing duties.
- Different staff members are volunteering to run meetings.
- The library manager is heard laughing in her office for the first time.

Measurable benchmarks are written down and based on counting.

- New library card sign-ups have increased 12% for the entire community.
- Requests for new materials are 15% higher than in other libraries.
- Circulation figures for journals are up 10%.
- Requests for computer access are up 23%.
- Complaints about the computer from library users are down 7%.
- An online survey shows a 73% satisfaction with the new interface.
- Donations from civic groups to the library are up 23%
- Positive stories about the library have increased 10% this year.
- Staff retention is up 21%

Strategic benchmarks are about the goals and mission/vision in the strategic plan.

- The new library is reaching previously underserved departments.
- The new library is catalyzing information projects at the school.
- The new library is the center for community life.
- The library users are becoming more computer literate.
- The computers expanded the library resources beyond its walls.
- More non-English-speaking people are using the library.
- Staff members are growing their management skills and stepping in new roles.
- The director is partnering with other economic and political leaders.

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If the plan is in your head, there is no plan!

“Let’s do science!”–K. Bradshaw

1. Use formal rituals at the beginning of meetings.
 - a. Introductions, shake hands, reminders of the rules.
 - i. Respect, but don’t reward bullies or lurkers.
 - ii. What are the consequences of incivility?
 - b. Governance:
 - i. Who...What...How...
 - c. Transparency breeds trust.
 - i. Input: solicit from everyone: 24/7, 365, 360.
 - ii. Feedback: Why we did it, and how well did we do?
 - iii. Review Agenda: the contract among the participants.
2. Always write input on a large board or flip chart for all to see.
 - a. Concise statements.
 - b. Keeps the group on track.
 - c. Reduces repetition, over and over and over again.
3. Use an impartial facilitator.
 - a. Bring in an outsider for serious issues and take turns running meetings.
 - b. The facilitator does not get to comment or vote.
 - c. Time is of the essence, but breaks are necessary.
4. Reserve a place to write “Fact Finding” assignments.
 - a. When you need facts backed by evidence.
 - b. A person is assigned with a deadline.
5. Create a T-Bar for each issue or choice.
 - a. Collect input from the group
 - b. Differentiate between opinions (guesses), feelings and facts.
 - i. Opinions and feelings are allowed.
 - ii. Facts need to be backed by evidence.
 - c. First, collect the costs—the minuses—for all of the issues or choices.
 - d. Second, collect the benefits – the pluses—for all of the issues or choices.
 - e. Weigh items for political, legal and non-negotiable concerns.
 - i. Ensure these are fact-based; current reality check.
6. Make the decision and assign who is responsible for executing it, and by when.
7. Communicate the decision within 24 hours to everyone.

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