INTRODUCTIONS

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

slido

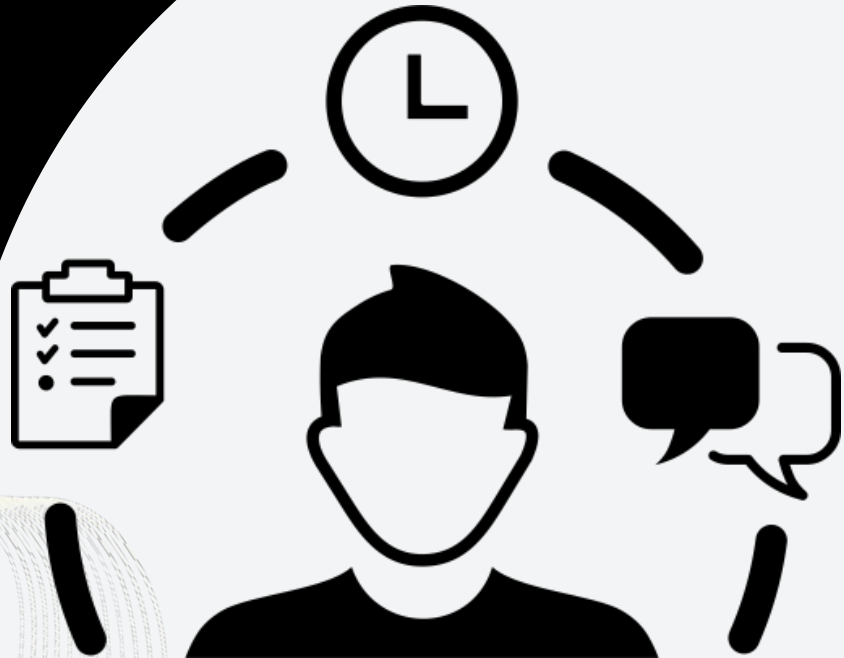**What's your experience with project management (select all that apply)**

WHY DOES PROJECT MANAGEMENT MATTER?

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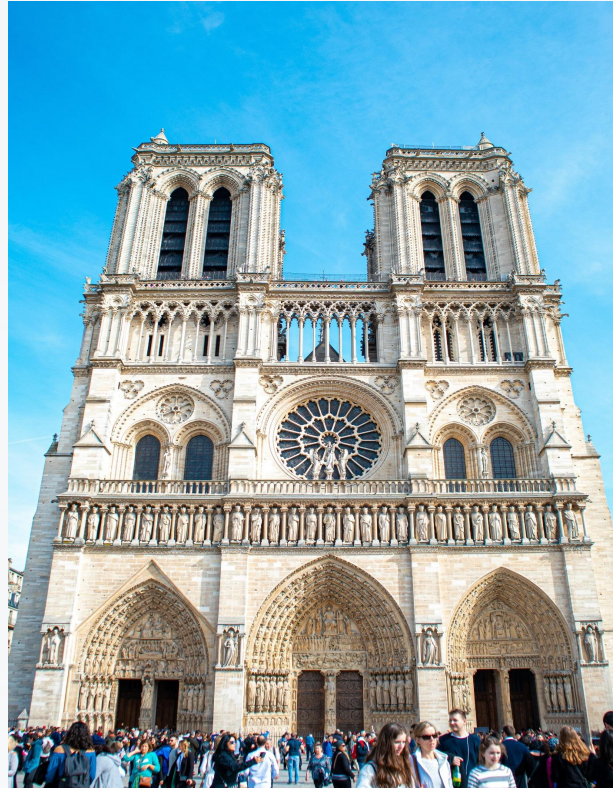
BEFORE "PROJECT MANAGEMENT" EXISTED…

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When did formal project management start?

MATRIX MANAGEMENT STRUCTURE

Green: Project manager

Yellow: Team members

Blue: Department heads
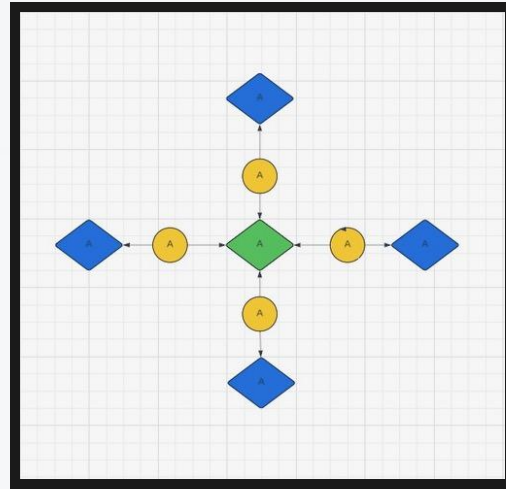
OVERVIEW TERMS & TOOLS

IN THE MUSEUM CONTEXT

ROLES

PROCESS

SCOPE

TIMELINE

TOOLS

ROLES

Project Manager versus Project Sponsor

Champion of overall success

Financing & Resources

PROJECT SPONSOR

Oversee day-to-day

Manage team & tasks

Track project progress

PROJECT MANAGER

Conducts project work

Communicates with Project Manager

PROJECT TEAM MEMBERS
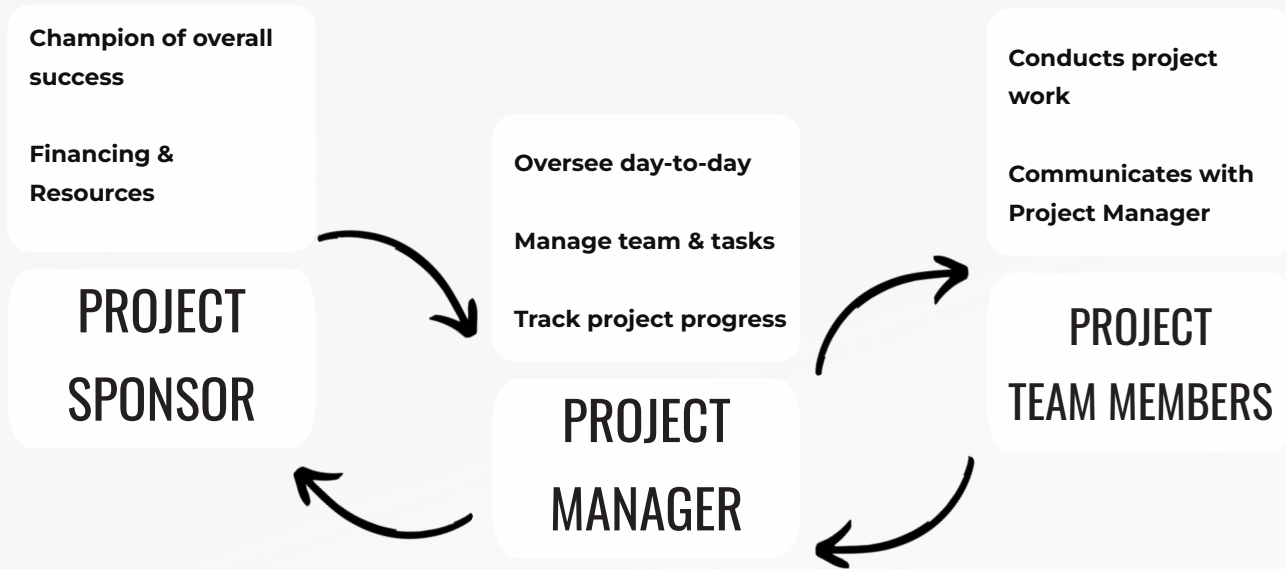
ROLES

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

VISITORS	STAFF	ADVISORS
COMMUNITY	FUNDERS	MEMBERS
EDUCATORS	MARKETING	EXHIBIT TECHS

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

PROCESS

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

PROCESS

RACI

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

PROCESS

RACI

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.

PROCESS

Responsibilities – RACI Matrix

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

Project: Baking a cake for Liz's birthday party

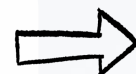| Deliverable/Phase	Jackie	Liz	Megan	Khristaan	Mary/Andrew
Selecting cake recipe	Responsible	Approver	Consulted	Informed	Informed
Baking cake	A/R	I	R	I	I
Sending invites	R	A	C	C	I

PROCESS

Budget

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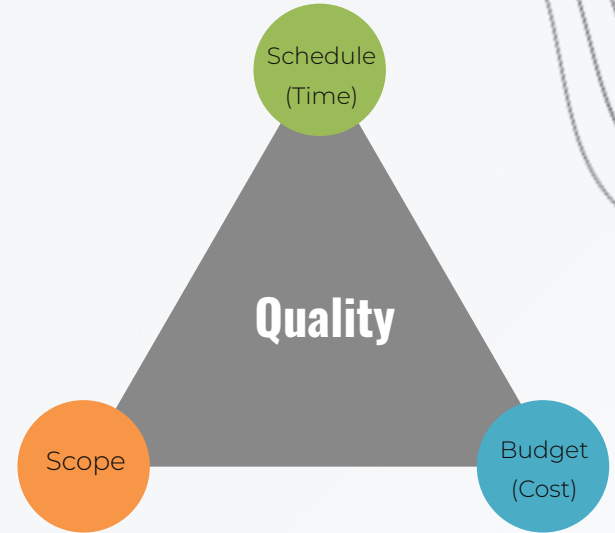- Budget tracking & reconciliation

BUDGET → $ SPENT & COMMITTED → PROJECTED

SCOPE

SCOPE CREEP

"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**

TIMELINE

Schedule

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 **_WANT_** to do what you **NEED** them to do? (other than begging or plying with food?)

Figure out what _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)
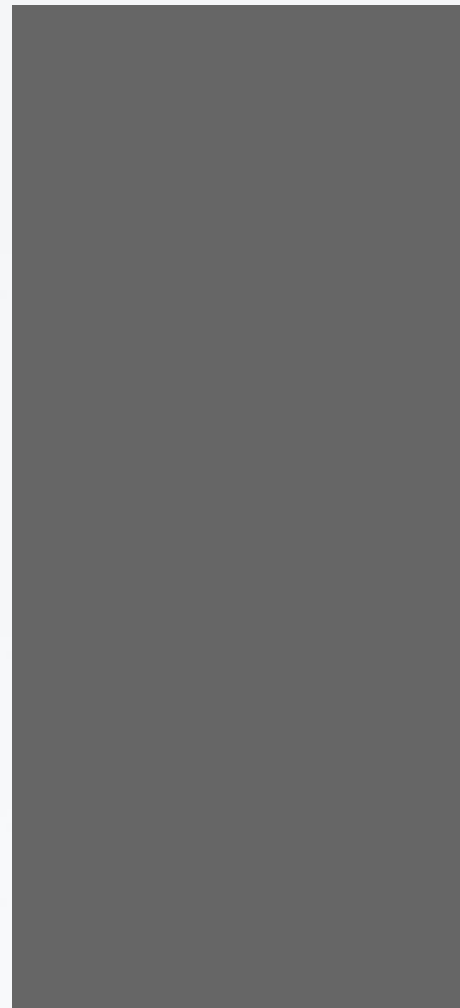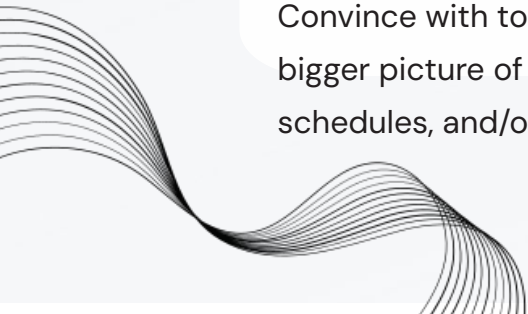
TWO ASPECTS OF PROJECT MANAGEMENT

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
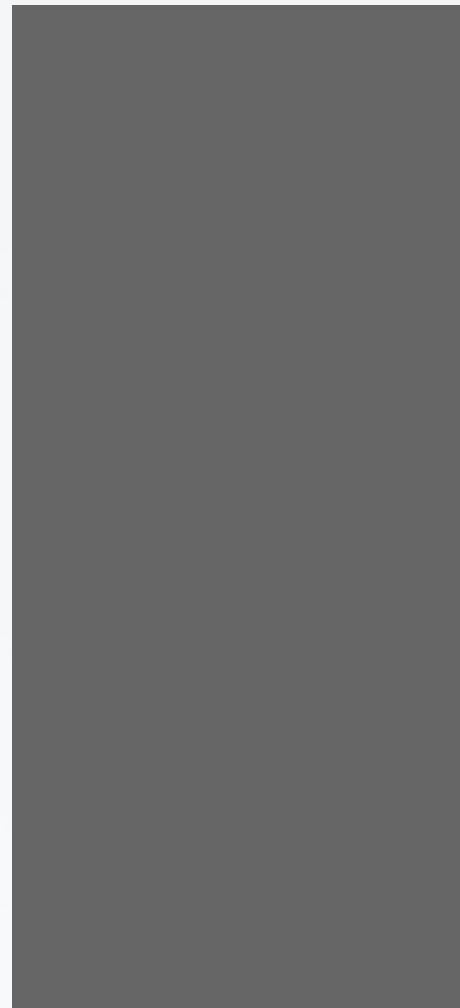
PROJECT MANAGEMENT FORMAL TRAINING

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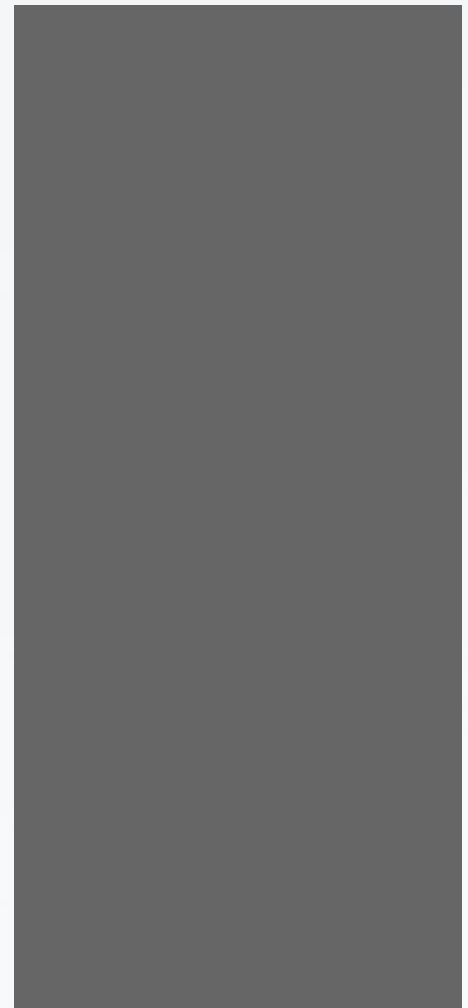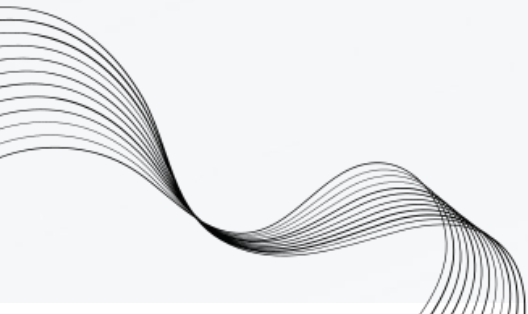
BENEFITS OF PROJECT MANAGEMENT

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

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- One person tasked with ensuring information gets to right people

Image courtesy of Dreamstime
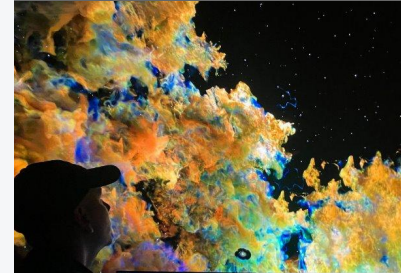
BENEFITS OF PROJECT MANAGEMENT

Enhances teamwork:

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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 Clearpoiint Strategy
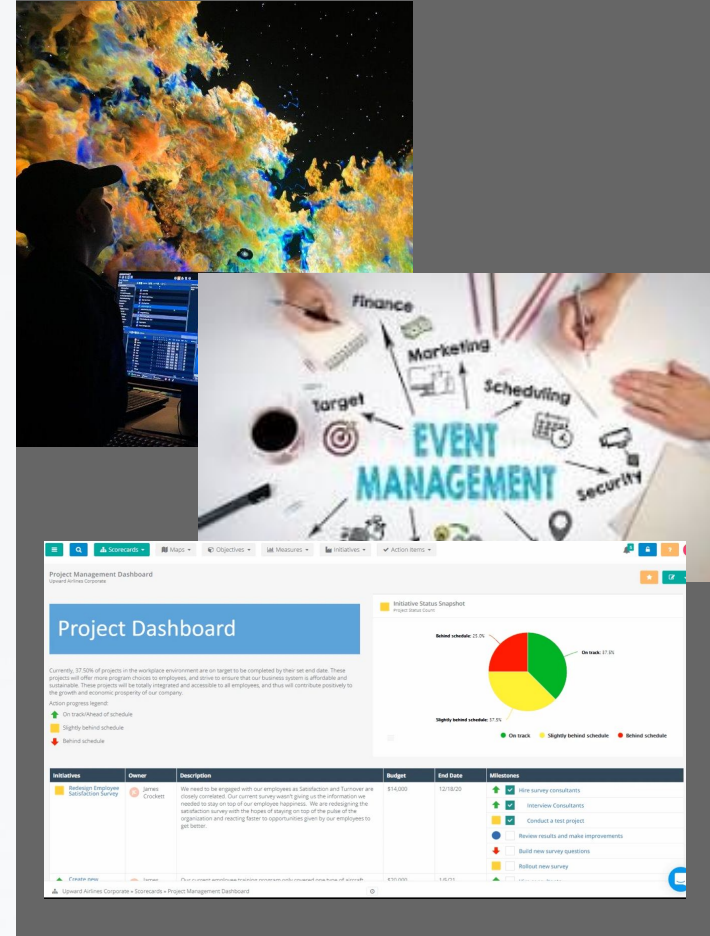
APPLYING PROJECT MANAGEMENT TO YOUR ORGANIZATION

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

PM THUNDERDOME!
Internal versus External Project Managers

Images courtesy of Project Management Happy Hour and PMO Squad

THE PROJECT MANAGEMENT JOURNEY

01 Ad Hoc Project Management — 6 months
1 - 2 years Standardizing Project Delivery — 02
03 Organizational Project Delivery — 3 - 5 years
6 - 8 years Strategic Project Delivery — 04
05 Generating Value — 9 - 10 years

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

- PM strategies to bring order to the chaos
- Stakeholder mapping
- Community-driven mindset
- Transparency in the process

The Solution

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

MUSEUM EXP
Your Project Team

PROJECT STAKEHOLDERS (BOARD, FUNDERS, ETC.)

COMMUNITY LIAISON & DEAI EXPERT

CONTENT DEVELOPER

SUBJECT MATTER EXPERTS

ARCHIVISTS

EXHIBIT RESEARCHER

MEDIA PRODUCER

MUSEUM LEADERSHIP

PROJECT MANAGER

COLLECTIONS MANAGER & REGISTRAR

MOUNT MAKER

PROJECT COORDINATOR

CREATIVE DIRECTOR & EXHIBIT DESIGNER

GRAPHIC DESIGNER

EXHIBIT PRODUCTION MANAGER

EXHIBIT FABRICATORS

EXHIBIT VENDORS

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

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

The Solution

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!

Current state assessment (April 2023)

PMO History

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

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

Moving to Better Project Delivery

THE PROJECT MANAGEMENT JOURNEY

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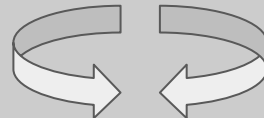
05 Generating Value — 9 - 10 years

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)
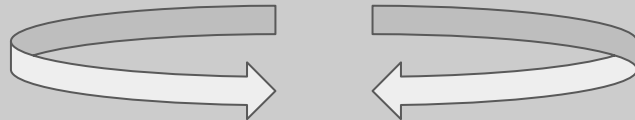- Build Resource Management Playbook

Build PMO Processes

Implementation Roadmap

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

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

PM Tool and Reporting

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

- Clear Vision and Mission
- Detailed Criteria and Guidelines
- Standardized Process and Governance

The Solution

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

Mission

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

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

Solution

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
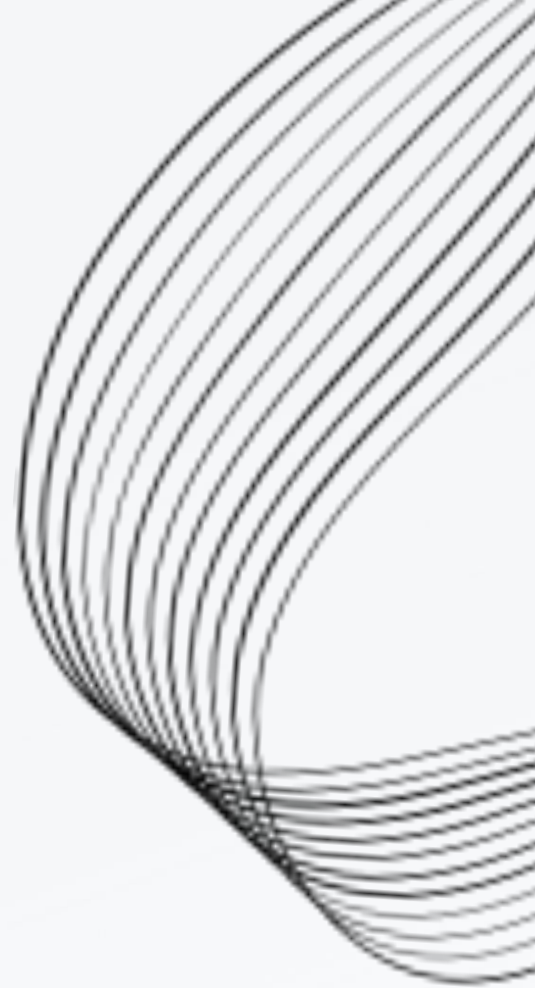
THANK YOU!

Project Management Templates
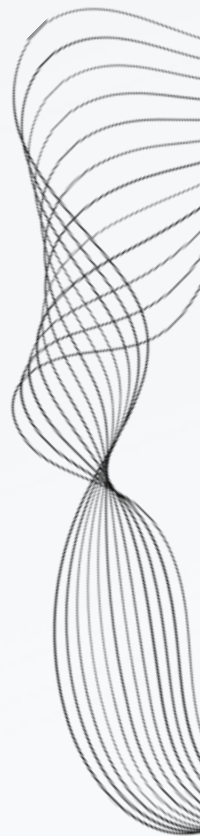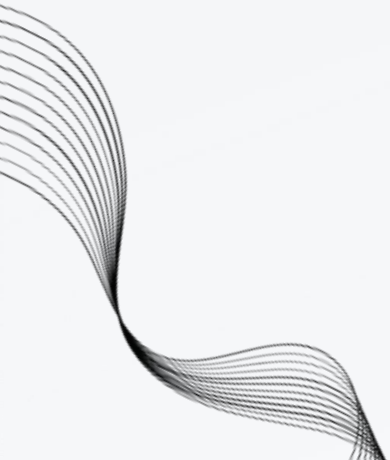
CONTENT

THANKS FOR WATCHING

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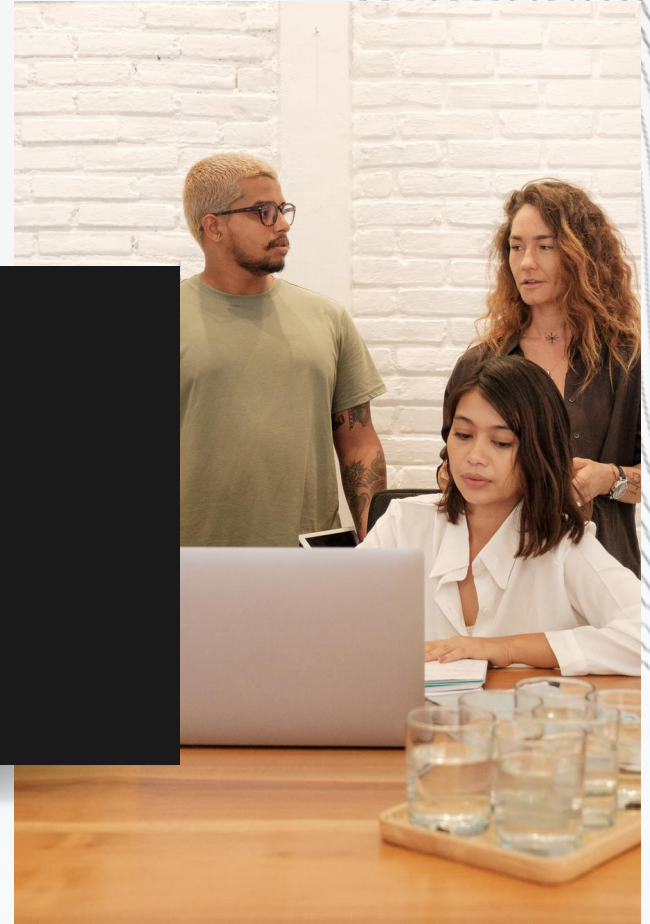
NEXT PROJECT

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PROJECT 1

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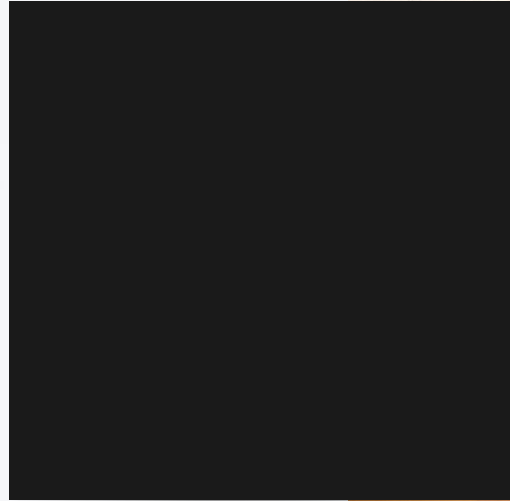
PROJECT 2

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PROJECT 3

CONCEPT IN BUSINESS

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

OUR TEAM

STATISTICS

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80%