

M CIDOC
Training

331 Basic project planning techniques and tools

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INTRODUCTION

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Agenda


- **Introduction**
- What is a project?
- The project triangle
- Methodologies and lifecycles
- Common problems
- Musinfo case study
- Conclusion

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Aims

- Focus on museum documentation projects
- Become familiar with basic project planning concepts and jargon
- Work effectively in a project




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Objectives

- On completion of the course you will be able to:-
 - Decide what should and what should not be a project
 - Recognise some common planning mistakes
 - Formulate a project proposal
 - Read a Gantt chart




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Audience

- This course is intended for:
 - Anyone organising or participating in a museum documentation project




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Course Prerequisites

- Have completed one or more CIDOC foundation modules
- Have equivalent experience



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WHAT IS A PROJECT?

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What is a project?

- Temporary
 - start and finish dates
- Clear outcome
 - product, service or result
- Unique, new, unfamiliar
 - not a repeating process or activity
- Constraints
 - time and/or resources



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Exercise

- Which are potential projects?

Activity	Project?
Purchase artworks appearing in auction catalogues	
Move bronze artefacts collection to new storage facility	
Prevent unauthorized access to sensitive data	
Translate website into Estonian	
Publish collections data as RDF	

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THE PROJECT TRIANGLE

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Project triangle

“Good, cheap, fast.
Pick any two”
Red Adair

Balance of Constraints & priorities

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Exercise

- Which two - Quality, Time or Budget?

Project	Quality, Time, Cost
USA Apollo programme	
National vaccination programme	
Weekend of DIY redecoration	
Planting an olive tree	
Automatic translation of website	
Purchase commercial software	

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METHODOLOGIES AND LIFECYCLES

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Project roles and organisation

```

graph TD
    SS[Steering committee] --- PS[Project sponsor]
    PS --- PM[Project manager]
    PS --- S[Stakeholders]
    PM --- TM1[Team member]
    PM --- TM2[Team member]
    PM --- TM3[Team member]
  
```

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Project lifecycle

1. Initiation
2. Definition
3. Planning
4. Execution
5. Closure

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- Include detail slide for each phase. Remove the next two.

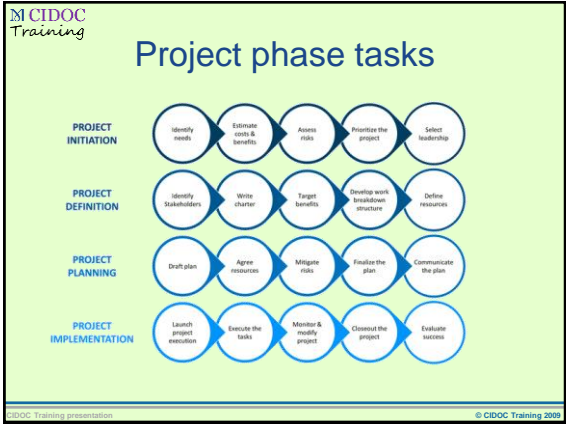
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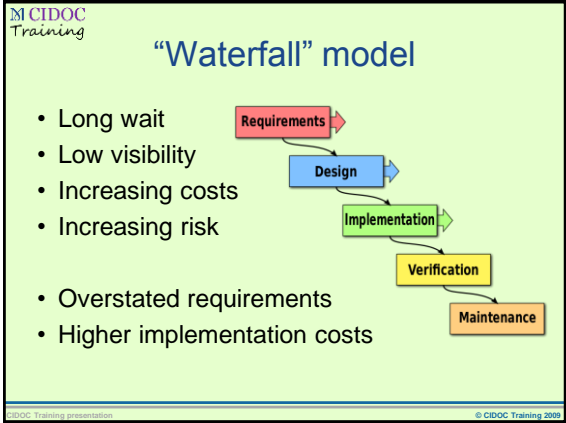
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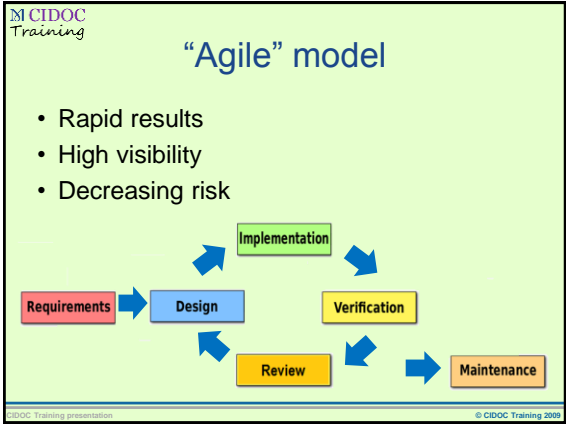
Project phase questions

- What tasks have to be accomplished?
- What *deliverables* must be created?
- Who should be involved?
- How gives approval?
- How long will it take?
- How much will it cost?

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Comparison

<p>Waterfall</p> <ul style="list-style-type: none"> • Sequential • Easy to understand • Fixed cost control • Well documented • Changes costly • All or nothing • High initial overhead 	<p>Agile</p> <ul style="list-style-type: none"> • Iterative • Rapid, visible results • Client involvement • Flexibility • Complex planning • Complex integration • Poor cost control
--	--

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Exercise

- Which method for which projects?

Project	Preferred methodology
Organise the 2020 CIDOC Conference	
Create new mobile app for upcoming exhibition	
Digitise all existing photographs, films and video recordings	
Create crowd-sourced app to collect feedback on historical photographic collections	
Organise a campaign to revitalise public perception of the Museum	

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COMMON PROBLEMS

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Common project problems

- Vague scope and goals
- Unrealistic expectations
- Unrealistic deadlines
- Scope creep
- Poor risk management
- Poor communication




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Project charter

- Scope & objectives
- Roles & responsibilities
- Stakeholders
- Budget & Resources
- Overall planning
- Context & constraints



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Gantt chart

- Vertical list of tasks
- Horizontal time axis
- Bar for start and end date of each task
- Critical path analysis

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Exercise

- Draw a simple Gantt chart for making a cup of tea

Task	Minutes								
	1	2	3	4	5	6	7	8	9

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Scope creep

- Uncontrolled expansion of scope...
- Without adjustment to time or cost
- Identify the changes
 - Use change request form
- Evaluate impact
 - Costs
 - Resources
 - Planning

Managing Change

Project	<input type="text" value="Change Request"/>	Request	<input type="text" value="Date"/>
Requester	<input type="text" value="Name"/>		
Technical Support	<input type="text" value="Name"/>	Cost Impact	<input type="text" value="Amount"/>
Quality Impact	<input type="text" value="Description"/>	Resource Impact	<input type="text" value="Amount"/>
Other Impact	<input type="text" value="Description"/>		
Notes	<input type="text" value=""/>		
Approved by Mr. Alice	<input type="text" value=""/>		
Approved on: 00/00/00	<input type="text" value=""/>		

www.rarexprojectmanager.com

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Risk management

- Avoid subjective guesswork...
- Identify
- Evaluate
- Prioritise
- Plan

IMPACT	High	Medium	High	High
	Medium	Low	Medium	High
	Low	Low	Low	Medium
		Low	Medium	High
		LIKELIHOOD		

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Exercise

- Classify as low, medium or high risk

Event	Likelihood	Impact	Risk level
Late delivery of lunch sandwiches			
Client delays payment			
Main server system failure			
Fine for copyright infringement			
Main supplier goes bankrupt			
Zombie apocalypse			

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MUSINFO CASE STUDY

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Musinfo

- 1993 - Information systems designed for Geneva's Municipal museums

Institution	Collections
Natural history museum (MHN)	5'000'000
Botanical garden (CJB)	3'000'000
Art and history (MAH)	1'000'000
Ethnography (ETH)	90'000

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Musinfo

- Follow up to several earlier, partially successful projects

Budget allocation	Amount CHF
CJB	765'000
ETH, MAH, MHN	720'000
MAH, creation of the inventory (personnel)	2'150'000
MAH, computerisation of the inventory	1'000'000
Acquisition of various computer applications for the museum	500'000

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Musinfo context

- Little off-the-shelf museum software available
- Most in English
- Political desire for integration
- Limited budget available: 500,000 CHF

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Musinfo scope

- Collections management
- Scientific research
- Diffusion to the general public

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Iterative development cycle

- Iterative development cycle:
 - Mock ups, fast development
 - User involvement
 - Faster feedback

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 "Cutting edge" web technology

Advantages

- Multiple platform compatibility (MAC/PC)
- Lower installation overhead
- Access via Internet

Drawbacks

- Untested
- Lower expertise
- Planning uncertainty
- Increased risk

```

    graph LR
      CI[Client interface] <-->|HTTP/HTML| WAS[Web application server]
      WAS <-->|SQL*NET| DS[Database server]
    
```

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 Project planning

- Feasibility study (Digital Consulting) 1994
- Preparation and planning 1995
- Development and implementation 1996 – 1998
- Low resources – longer duration

	1996			1997			1998		
ETH	█	█	█						
MHN				█	█	█			
MAH							█	█	█

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 Contracting

- Project managed by City Computing dept.
- Specifications developed in house
- Development outsourced
- Separate contracts for each institution

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Musinfo user interface

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Musinfo final report

- On budget and within planned time-frame
- CJB did not participate (but claimed share of budget)
- MHN rejected application on delivery
- Public web access never implemented
- Separate databases for each institution, never combined
- Plans for commercialization abandoned
 - No post-project maintenance
 - Poor user-training and support
 - High maintenance costs and long delays
 - End-user frustration
- Musinfo no longer in use
 - ETH replaced by in house development -2003
 - MAH replaced by commercial software (Museum Plus) in 2008

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CONCLUSION

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Conclusion



“If you fail to plan, you are planning to fail!”
 – Benjamin Franklin

“If Plan A fails, remember there are 25 more letters”
 – Chris Gullebeau

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Resume

- What should and should not be a project
- The project triangle – balancing cost, quality and duration
- Lifecycles and methodologies (Waterfall vs Agile)
- Problems and solutions
- Musinfo case study

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References

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<http://www.scf.usc.edu/~csci201/lectures/Lecture11/royce1970.pdf>
- David K. Dean (2015) *Planning for Success: Project Management for Museum Exhibitions*, Wiley
<https://onlinelibrary.wiley.com/doi/pdf/10.1002/9781118829059.wbilm216>

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Täna!

- Evaluation:
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