

ME1



**"WHO ME?"**  
**THE CITY CLERK AS PROJECT MANAGER**

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**WE ASKED... WHAT ARE HURDLES?**

*"FINDING TIME AND RESOURCES"*

*"SELECTING THE RIGHT TEAM"*

*"HAVING THE RIGHT TECH TOOLS"*



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**MORE HURDLES**

*"ROLE CLARITY"*

*"BALANCING THE BUSINESS NEED WITH THE IT VISION"*

*"CITY MANAGER CONFIDENCE "*



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WHAT IS GETTING IN THE WAY



The challenge isn't technical, it's the political, power dynamics - how to expand Clerk influence.



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WHY YOU?  
SPECIAL ATTRIBUTES OF CITY CLERK



- Global Perspective on organization
- Cross Departmental Relationships
- Responsible for meeting statutory deadlines
- Understands "political realities"



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ASK US NOW...

Text questions to our Moderator,  
**Michelle Poché Flaherty**  
650-509-0726

As appropriate during presentation Michelle will interject your questions.

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**YOU WILL LEAVE WITH**

- **A Basic Understanding of PM Principles, Practices and Resources**
- **Renewed confidence in PM skills**

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**YOU SHARED POTENTIAL PROJECTS**

- ✓ RECORDS MANAGEMENT
- ✓ ELECTED ONBOARDING
- ✓ PRA PROCESS
- ✓ ELECTIONS

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**PROJECT MANAGEMENT IN 5 STEPS** ME2 ME4

- INITIATE**  
Story Telling
- PLAN**  
Resources
- EXECUTE**  
Working Plan
- MONITOR**  
Oversight
- CLOSE**  
Implement

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## CHANGE MANAGEMENT REALITIES

- **Projects often** enhance resources, solve problems, create positive new products or services
- **Projects always create change** and require Change-Management planning



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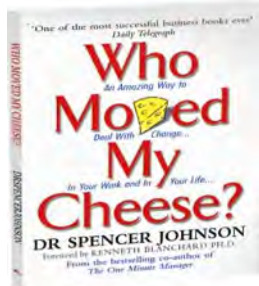
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## INITIATING: CHANGE MANAGEMENT AND COMMUNICATION

- **Telling/Selling the Story**
  - What is possible? Why is it needed?
  - What resources will be saved?
  - What is industry trend?
  - How will work life be improved?
  - Success Criteria and Vision



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**INITIATING: SETTING THE GOAL/CHARTER**

- Clarifying/Codifying the Activities
- Estimating and Budgeting
- Resource and Feasibility Planning
- Element of Kickoff Documentation

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**INITIATING: SETTING THE GOAL/CHARTER**

- What are we definitely not doing?
- How much work is to be done?
- What are the deliverables?
- Levels of authority and controls
- What are parameters/scope of project?

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**WHAT IS A CHARTER?**

**Critical formal document - outlines project objectives, scope, identifies main stakeholders and roles, defines PM authority.**

**How to authorize scope -funding changes, cost controls**

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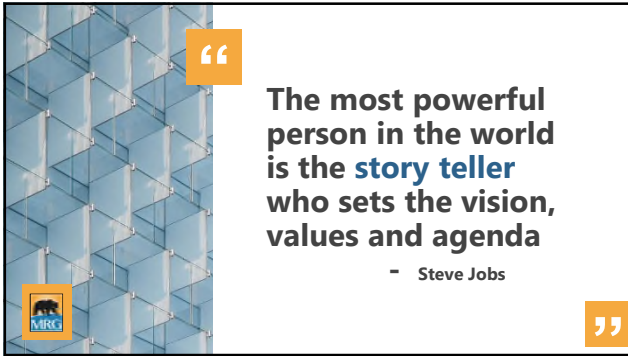
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“  
**The most powerful person in the world is the **story teller** who sets the vision, values and agenda**  
- Steve Jobs

MARC logo in bottom left and top right corners.

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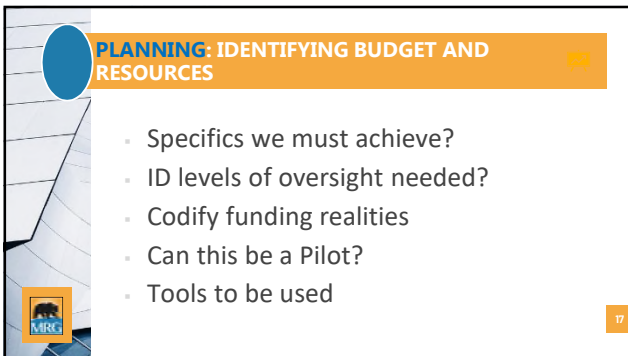
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**PLANNING: IDENTIFYING BUDGET AND RESOURCES**

- Specifics we must achieve?
- ID levels of oversight needed?
- Codify funding realities
- Can this be a Pilot?
- Tools to be used

MARC logo in bottom left and bottom right corners.

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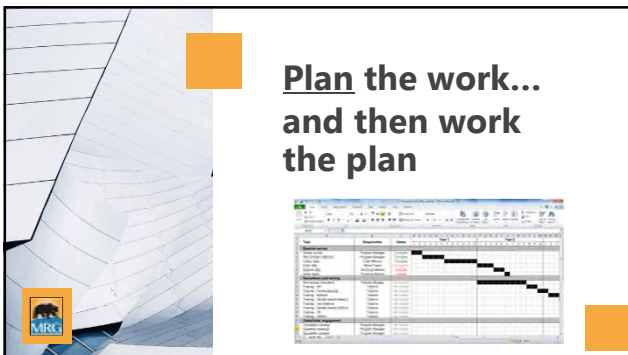
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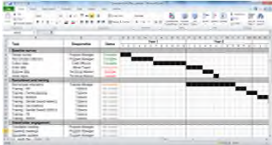
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**Plan the work... and then work the plan**



MARC logo in bottom left and bottom right corners.

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**PLANNING: ASSEMBLING TEAM**

**Core/Working Group**

- Who is on the team? Roles?
- What is the chain of command?
- How will we work together?

**Satellite Group/Support**

- Who are stakeholders?
- Who are Sponsors/Champions?

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**PLANNING: ASSEMBLING TEAM**

**Stakeholder:** person, group or system impacted by project.

**Sponsor:** Ultimately responsible for project, secures \$ resources, in cash or in-kind, for project. (Often CM)

**Team member:** Those working on project.

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**PLANNING: IDENTIFY RISKS**

What/who might derail project?  
Likelihood of issues emerging?  
ID detractors? Engage in process early?  
How can we mitigate risks?  
What can we do *now* to prepare?

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**PLANNING: WORK BREAKDOWN STRUCTURE**

Breaking work, data, service into deliverable pieces

Phased assignments for the project team to meet deliverable plans – helps manage schedule and costs

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**TOOLS AVAILABLE**

SMART SHEET  
MS PROJECT  
BASECAMP  
ASANA  
GOOGLE DOCS  
SLACK

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Status Date: 02/Mar/2007

WBS Description	Jan07				Feb07				Mar07				Apr07				May07
	25	01	08	15	22	29	05	12	19	26	02	09	16	23	30	07	14
<b>Sample Project Plan</b>	[Gantt bar]																
1 Literature Search	[Gantt bar]																
2 Concepts Development	[Gantt bar]																
3 Lab Models	[Gantt bar]																
4 Design	[Gantt bar]																
5 Prototype	[Gantt bar]																

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## MORE COMMUNICATION

- Pod or Web cast
- Email
- Intranet bulletin boards
- Blogs
- Project website
- Project newsletter
- Table top presentation or display

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## WHAT TO DO

# “Let's Talk”

## WHEN THINGS GO WRONG

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## MONITORING: RESPONSE PLAN

- Revisit Communication
- Engage the Project Champion (CM)
- Identify problem & size/impact
- Who will take the lead on fix?
- Use as growth opportunity
- “Learn to take breaks, not to quit”

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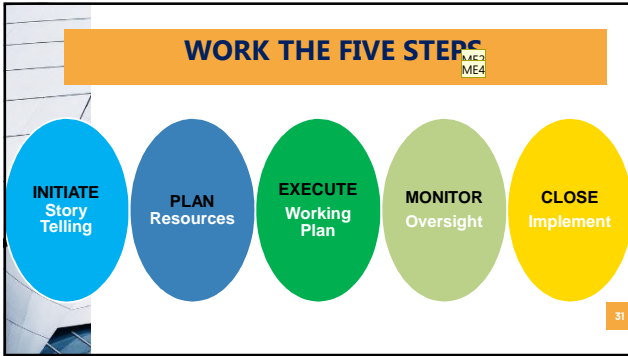
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**CLOSING**

- Acknowledge work, people, and partnerships
- Ensure Implementation complete
- Debrief, Evaluate and learn
- Celebrate

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**QUESTIONS**

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## Mary Egan and Shirley Concolino

Providing  
Innovative and  
Practical Solutions  
for our clients for  
over 10 years

- Workplace Investigations
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- CEO & Executive Evaluations
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- Parks & Recreation
- Use Planning

Solutions-MRG.com 916-261-7547



Linn Walsh

lwalsh@cityofmillvalley.org

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## **Project Management Essentials for City Clerk Executives**

**By Mary Egan and Shirley Concolino**

We're all familiar with the guidance "if you fail to plan, you plan to fail". As organizational leaders, we uncover opportunities to streamline and improve operations that are not apparent to others due to our global perspective. The challenge is how to operationalize improvement opportunities and successfully bring a project to conclusion.

City Clerks are natural project managers, currently responsible for meeting statutory deadlines, tracking written materials and complex projects, and serving as subject matter experts in a variety of areas critical to an agency's success. Clerks have a unique perspective, an understanding of "political realities" and an eye for efficiencies and enhancements that could improve city operations.

The daily activities of the City Clerk require knowledge of constituent demands and expectations. With the increased need for government transparency, 24/7 access to City records, demands for public record release, and clarity in agenda and actions, the time has never been better for expansion of the Clerk's role as a project leader.

### What do we mean by Project Management?

Project Management is a learned set of "hard skills", tools and techniques and "soft" skills such as communication and conflict management that enables the visionary leader to build support for the financial and time commitment to organizational change, assemble a team of engaged stakeholders, track and lead the project following a critical path and ensure successful completion.

### Critical Elements for Managing a Successful Project

There are several key project management skills that build upon project management theory, best practices and experiences that are critical to deliver results. This article identifies the critical project management tools to guide and inspire leaders.

### ***Leadership Vision – Serving as a Change Manager***

Every project starts with a vision of a new possibility. The success of any program relies upon a well-executed front-end effort to build enthusiasm for change. Most are familiar with Stephen Covey's, *The 7 Habits of Highly Effective People*, and so adeptly stated by him, one must "begin with the end in mind". By clearly envisioning the end game, we can steer a project to achieve that predetermined goal.

The Project Manager begins with a clear business case for the change, facilitates a critical path for achieving the vision, seeks "buy in" and assigns responsibilities to stakeholders and task-focused staff and vendors. Serving as an architect, the Project Manager facilitates the free flow of critical information, resolves conflicts and monitors progress toward the end goal. Finally, the Project Manager serves as the "cheerleader" for the project as few meaningful changes are successfully implemented without an enthusiastic visionary leader.

Leadership in the project management context includes ensuring that the project does not begin without a carefully constructed process, timeline and deliverables. The Project Manager does not have to be the most senior leader in the organization but must visualize their role as a “stand in” for those up the chain of command, including the elected body to ensure that the project resources are well used, and the outcome as intended.

Leading those outside normal chain of command requires:

- 1) A clear project charter includes the scope of work, required deliverables, expected quality and performance metrics, a project related timeline, an anticipated final outcome and pilot testing expectations. It should also clarify team roles, hierarchy, authority and ultimate decision-making chain of command clearly defined in a Charter;
- 2) Establishment of a project team typically includes categories of Sponsor, Steering Committee, Users Group, Specialized Expert Users, Pilot Team, Legal Support, Contract Management and Trainers. These role definitions provide a road map for addressing change requests, timeline changes and other forces outside the control of the Project Manager. This group can also establish the priority of desired deliverables, and make decisions with the larger organization in mind;
- 3) Developing a team motivated to perform through shared expectations and accountability processes.

### ***Framing the Project Life Cycle – the Master Plan***

A goal without a plan is a “wish”. The master plan is the critical document that drives the project-based activities from the RFP through the post-implementation debrief. The plan is simply organizing the tasks in the order required to optimize time and meet deadlines.

All projects have a delivery date – which requires a thoughtfully constructed timeline. The schedule must be carefully developed because it establishes expectations and allows stakeholders to manage their time and staff resources to support the project.

Planning tools help identify major milestones, and then define and sequence critical tasks, estimate resource needs, and divide project elements into smaller pieces that can be more easily managed and controlled.

There are many easy-to-use online project management tools that make the planning phase much easier readily available. Applications, such as Smart Sheet, Zoho Project Manager and Basecamp, provide access to visual tools such as Gantt Charts and allow online collaboration. These tools allow for “what if” scenarios, to compare the impact of extending timelines or phases, allows for planning of resource availability, and early indication if there are likely project delays.

There are many best practice tools within these software programs to help break the work into meaningful tasks develop a schedule (critical path) and estimate resource needs. No matter the size or scope of the project, the schedule is critical to define when each activity should be completed, and the path toward completion. It is a living document, changing as issues arise. The well-executed project plan also helps guard against or effectively manage “scope creep” where new deliverables or project expectations are added to the project while underway.

In some cases, with major projects the Project Manager is relieved of other day to day responsibilities to focus on the Project Management workload. However, with limited resources and growing expectations, it is likely that the project will be an added expectation to a normal set of deliverables.

Time management is a critical success skill for project managers. Clerks may find that adopting some of the same communication skills, work flow and organization tools and project planning systems for a normal workload help maintain balance.

Allocate specific periods of time for focused project management responsibilities among other City Clerk activities. Parkinson's law tells us that a project will expand to the time allocated. Think carefully about how your time is allocated. The project plan can eliminate energy- and time-wasting tendencies by focusing and executing the team's goals.

### ***Communication – The Glue that Holds the Project Together***

Project management inherently requires staff in the organization to change a current process, and in many cases master a new skill. Project management brings together a disparate group of staff, often with competing interests and expectations and crafts a joint vision of success.

Communication expectations, norms and methods are a critical element of the plan and should be codified in the project Charter, the contract documents and the critical path/timeline.

Teams struggle without clarity on what they need to do, why and how they need to do it, and when they must deliver. The project manager balances listening to understand with direction to ensure questions are answered. A successful Project Manager does not have to be the subject matter expert on the topic but must know how and when to access technical resources. However, Project Managers must work to understand the platforms, systems and work flow related to the project at a deep enough level to facilitate the critical conversations with confidence.

Clear and regular communication is necessary to control rumors, clarify direction and manage the scope and anticipated outcomes. The best projects have managed stakeholder expectations by providing accessible information available in a virtual and updated format for review. These methods can also be used to solicit ideas, guidance and concerns from impacted staff without a direct role in the project. The Project Manager must keep an open ear to “naysayers” who must be heard early in the project.

Meetings can be a “thief” of productive project time. However, they are critical for success. Project managers develop effective meeting skills and ensure that project related staff prepare agendas in advance, manage meeting times and outcomes, and follow up with action items. Project communication includes clear status reports that define project details, reinforce the change management opportunities and next steps by project phase.

Finally, the Project Team must be considering the change management impacts on the culture. If those impacted by the change are not considered, it can and often does negatively impact the implementation. When the organization is “on board” the odds of success are greater.

### ***Self-Management – Managing the “Project Manager”***

City Clerks are often among the most task laden staff in any agency. They have required routines and protocols that, if breeched, interfere with the governing body's ability to conduct business. These are high stakes responsibilities. The Clerk is uniquely situated to impact the organization and inspire change.

Demonstrating your ability to enthusiastically communicate envision an opportunity to improve operations, your vision and your understanding of how to pull teams together for a common goal to benefit the organization helps define you, the City Clerk, as an asset. Isn't this ultimately how one takes a seat at the table?





## Kick Off Plan

# THE TOP 20 MOST POPULAR

## Project Management Software

By Capterra June 2018 <https://www.capterra.com/project-management-software/#infographic>

Project Management Software gives any team the ability to organize, collaborate, and track details and responsibilities of their projects. The Project Management Software industry is now over \$1 billion with hundreds of competitive solutions. Below is a look at the most popular options as measured by a combination of their total number of customers, users, and social presence. To see a comprehensive list, please visit our [Project Management Software Directory](#).

SOFTWARE	MARKET SCORE	CUSTOMERS	USERS	REVIEWS	SOCIAL
<a href="#">Microsoft Project</a>	75	880,000	22,000,000	518	FACEBOOK - 270,922 LINKED IN - 5,472,967 TWITTER - 32,000
<a href="#">Wrike</a>	71	1,510,000	2,530,000	927	FACEBOOK - 16,525 LINKED IN - 14,083 TWITTER - 11,900
<a href="#">Atlassian</a>	70	50,000	65,000,000	2,526	FACEBOOK - 181,103 LINKED IN - 111,311 TWITTER - 28,600
<a href="#">Basecamp</a>	64	285,000	15,000,000	4,976	FACEBOOK - 59 LINKED IN - 14,149 TWITTER - 124,000
<a href="#">Trello</a>	57	72,647	4,750,000	3,919	FACEBOOK - 107,005 LINKED IN - 17,693 TWITTER - 162,000
<a href="#">Asana</a>	57	200,000	2,000,000	3,607	FACEBOOK - 254,586 LINKED IN - 20,486 TWITTER - 118,000
<a href="#">Teamwork Projects</a>	55	382,057	3,433,298	360	FACEBOOK - 23,880 LINKED IN - 3,440 TWITTER - 9,947
<a href="#">Podio</a>	55	500,000	2,500,000	158	FACEBOOK - 20,536 LINKED IN - 244,974 TWITTER - 17,200
<a href="#">Smartsheet</a>	46	100,000	1,500,000	503	FACEBOOK - 11,822 LINKED IN - 17,819 TWITTER - 11,400
<a href="#">Freedcamp</a>	43	347,000	800,000	100	FACEBOOK - 3,375 LINKED IN - 472

					TWITTER – 2,069
<a href="#">monday.com</a>	40	30,000	1,000,000	764	FACEBOOK – 294,257 LINKED IN – 5,289 TWITTER – 5,371
<a href="#">ProjectManager.com</a>	39	110,000	550,000	230	FACEBOOK – 72,175 LINKED IN – 5,694 TWITTER – 36,800
<a href="#">VersionOne</a>	38	50,000	1,250,000	31	FACEBOOK – 4,048 LINKED IN – 6,453 TWITTER – 8,372
<a href="#">Zoho Projects</a>	35	20,000	1,200,000	127	FACEBOOK – 165,972 LINKED IN – 113,713 TWITTER – 1,781
<a href="#">Mavenlink</a>	35	50,000	750,000	244	FACEBOOK – 18,362 LINKED IN – 6,120 TWITTER – 7,853
<a href="#">Assembla</a>	28	4,000	1,000,000	26	FACEBOOK – 10,235 LINKED IN – 928 TWITTER – 4,723
<a href="#">WorkflowMax</a>	26	12,000	756,000	73	FACEBOOK – 2,977 LINKED IN – 1,390 TWITTER – 6,821
<a href="#">iTaskX</a>	26	28,000	72,800	2	FACEBOOK – 28 LINKED IN – 0 TWITTER – 0
<a href="#">Pivotal Tracker</a>	25	20,000	200,000	65	FACEBOOK – 19,062 LINKED IN – 274 TWITTER – 10,900
<a href="#">Workfront</a>	25	3,000	473,000	542	FACEBOOK – 4,740 LINKED IN – 20,950 TWITTER – 8,171

**\*Customer and user numbers are provided by the companies in this report. Capterra does not audit them but uses third-party data to both challenge questionable numbers and to make estimates for companies that do not provide data. Please refer to our blog for further insight into our research and methodology.**

Another great and more detailed review of Project Management Software products can be found at PC Magazine <https://www.pcmag.com/article2/0,2817,2380448,00.asp?source=autosuggest>