

Managing Assessment Projects in the Real World

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WORKBOOK

This workbook contains activities and resources that supplement the information in the presentation.

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Communication Styles

Everyone has different **communication** and **work** styles, each with strengths and weaknesses. As project managers, being aware of your style and your team members' styles helps your team operate effectively.

Key points:

- When project managers understand everyone's communication styles, we can work most effectively together.
- Some styles are more comfortable in different project team roles.
- Communication between styles can be identified and leveraged.
- Communication styles are *not* skills. They cannot be "taught." Conversely, team members with certain skills should not be assumed to have particular communication styles.
- "We're all in this together" even if we're not all alike: all styles operate within a project to reach for a shared goal.

Tools for investigation:

- MBTI – Myers-Briggs Type Indicator
- Keirsey Temperament Sorter
- 16 Personality Factors
- TRI – The Temperament Research Institute
- HBDI – Herrman International, Whole Brain Thinking

→ See: [Bibliography for Communication Styles](#)

About the tools:



These tools allow us to identify **temperament, communication/interaction style, and group dynamics**. Typically, using a set of questions and applying a scoring matrix, these tools help individuals and groups understand their internal dynamics and individual styles. Once you identify these elements in yourself and in your group, you can better understand and work with many "types" to get the job done.

Note: we are not trained experts! Many of the materials listed above require trainers to go through a certification process before conducting any activities. We have provided a very basic "gloss" of this material so that you can determine the right tools for you, assess your needs, and pinpoint areas for further exploration.

Activity 1

Explore the facets of your teams' personality and communication styles.

Place the number of the trait that describe you in the "Me" column, and then do the same for two team members. (Results are best when each team members does a self assessment.) When you are finished, tally your column.

Example:

Type	Description	Me?
4	Ability to recognize and seize opportunities	
2	Accountability	2

You might think a particular term describes everyone – but it doesn't. When you are finished, share your findings with your neighbors. The results may surprise you!

Personality Facets

Type	Description	Me?
4	Seek variety	
3	Enjoy scientific or technical work	
1	Seek meaning / significance	
4	Want freedom to choose a course or path	
2	Protect and maintain are main goals	
4	Ability to recognize and seize opportunities	
2	Work better with order and rules	
1	Seek different perspectives	
2	Seek accountability	
3	See the bigger picture	
2	Trusting of authority	
1	Inspirational	
4	Enjoy work that changes or varies	
1	Actions today make a better tomorrow	
2	Seek courses of actions within boundaries	
3	Individualism	
1	Kind, benevolent	

2	Belong to the group	
3	Master a task	
1	Enjoy people-focused work	
3	Designing and inventing	
2	Enjoy business-focused work	
4	Impulsive	
3	Calm	
1	Authentic	
2	Generous	
4	Negotiator	
1	Coach / Mentor	
3	Theoretical	
4	Detail-oriented	
1	Intuitive	
3	Precise	
2	Serious	
4	Spontaneous	
3	Logical	
4	Adventurous	
2	Stable	
1	Enthusiastic	
3	Strategist	
4	Optimistic	

Totals

	Type 1	Type 2	Type 3	Type 4
Me				

Activity 2

Communication Traits and Group Dynamics: Discussion

Topic:

Let's explore communication styles and group dynamics. What do you have in common with your team members, in terms of what you want to accomplish and how you like to work? Are there any potential conflicts? Identify how you can use this information to improve your assessment project management.

Note: there is much more to these activities – based on personality types, interactions, and communication styles, you can really assess quite a lot! We encourage you to explore the resources listed in the bibliography and discuss potential workshops with your Human Resources Department.

Team Member Roles

Roles help us identify the responsibilities and authorities that a group asks of each team member. They apply communication and interaction styles to everyday scenarios.

Now that you understand the communication styles of yourself and your team members, how can you build an effective assessment project management team?

It's critical to understand why everyone is on the team and what he or she will contribute to the assessment project.

→ When everyone on your team understands their role, meetings and projects run much more smoothly.

The exercise below will help you outline some core project team member roles. Looking at your team, ask:



- Who's on the team?
- Why are they on the team?
- What will each member contribute?
- What decisions can each member make?
- Which meetings does each team member **need** to attend?

One team member will often serve multiple roles.

→ See: [Bibliography for Team Member Roles](#)

Activity 3

Identify the team members that fill the roles listed below, and the authority assigned to that role. The terms and responsibilities outlined below are general; adapt them to your teams needs. The important part is that each team member clearly understands his/her role.

Role	Responsibilities (what you do)	Authority (what you decide)	Team member
Project manager	<p>Ensure that team members understand their roles and expectations</p> <p>Assign work to team members and sub-teams</p> <p>Set meeting agendas</p> <p>Run meetings</p> <p>Maintain the project timeline and work break down structure</p> <p>Ensure that milestones are met</p> <p>Ensure that budgetary goals are met</p>		
Client	<p>The person or group that created the project team, or provided the charge</p> <p>Establish expectations and deliverables</p>		
Leader	<p>Provide motivation</p> <p>Provide focus</p> <p>Work with sub-teams</p> <p>Manage conflicts and problem-solve within the project team</p>		

(cont'd)

Role	Responsibilities (what you do)	Authority (what you decide)	Team member
Communicator	Communicate team progress to colleagues, committees, departments, etc. Bring information from representative groups to the project team as needed		
Experts	Possess specific skill-sets or knowledge to contribute to the team		
Worker	Accomplish tasks as assigned		
Decider	Use assessment project output to make data-informed decisions		

Activity 4
Identify skill sets

It's also important to understand the specific skill sets that each team member brings to the assessment project, even skills that don't appear to be directly related to assessment.

At Columbia, we see assessment projects as opportunities for staff to build *new* skills, and therefore want to understand everyone's interests. For example, the Web Librarian doesn't always have to maintain the webpage; s/he may be interested in data analysis or running a focus groups.

Team Member	Skills	Interests

Activity 5
Identify project team skill gaps

Looking at your assessment project, and your team, what skills do you have, and what skills will you need to seek external resources to support? What actions might you take to manage any skill gaps?

Example:

Project Team Skill Gap	Potential Actions
We need help with SPSS; our assessment project team has limited experience with this software.	Find a graduate student in the Statistics Department to work with us.

Project Team Skill Gap	Potential Actions

Work Breakdown Structure (WBS): A Plan You Can Stick To

The work break down structure will help the entire team understand the scope of the project, the tasks you need to accomplish, in what order, when, and by whom.

Key points:

Use Post-It Notes to classify your tasks. Assign a color for each type, as listed below.



Deliverables: What will the team produce?

Hierarchical components: Each aspect of the overall deliverables.

Tasks and sub-tasks: What do we need to do to achieve/produce the deliverable?

Assign **responsibility** and **due-date** for each component and task.

This is a **team activity**; everyone should contribute to creating the WBS. Participating in creating the WBS will help the team understand their shared goals, and will give team members an opportunity to start working together and sharing ideas.

WBS Tips:

- The work break down structure should be **exhaustive** - don't leave anything out.
- **Nothing is set in stone.** You can add and remove items from the WBS as the project progresses.
- De-duplicate: make sure that each component or task is an **individual item**. Overlaps can lead to confusion, duplication of effort, and conflict.

→ See: [Bibliography for Work Breakdown Structure](#)

Activity 6

Developing a Work Breakdown Structure (WBS)

Reserve a conference room with plenty of accessible wall space. Bring your laptop to record the WBS once it's complete. Make sure there are plenty of Post-It Notes to go around.

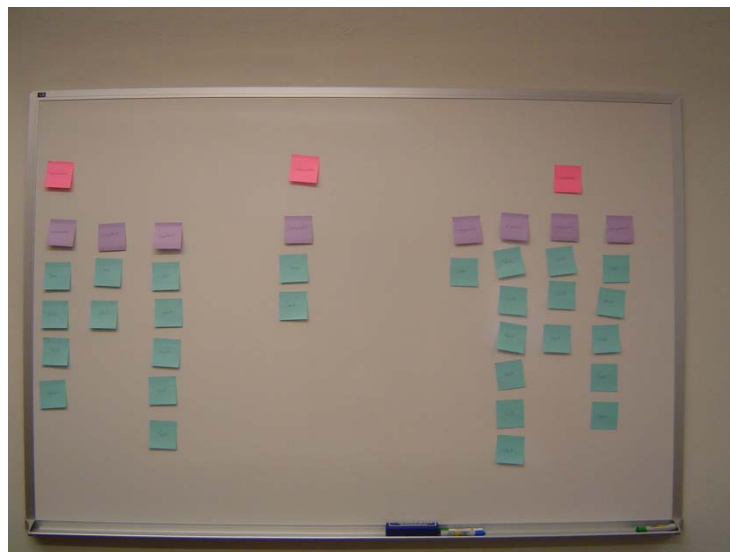
1. Begin with the **deliverables**. Assign these a Post-It note color (**pink!**)
 - a. A typical assessment project has five deliverables:
 - i. Project Plan
 - ii. Information Needs
 - iii. Data Sets
 - iv. Analysis
 - v. Report & Recommendations
2. Write each **deliverable** on a separate Post-It note.
3. Post your **deliverables** horizontally on the wall.



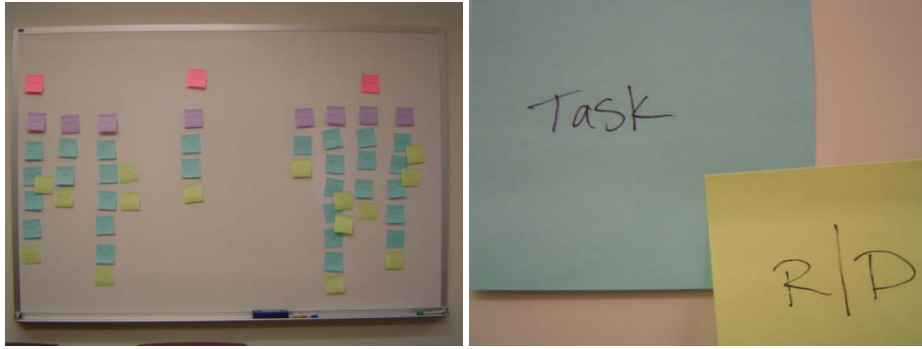
4. Choose a different Post-It note color (**purple!**), and start writing the **components** of each **deliverable**.
5. Post the **components** underneath each **deliverable**.



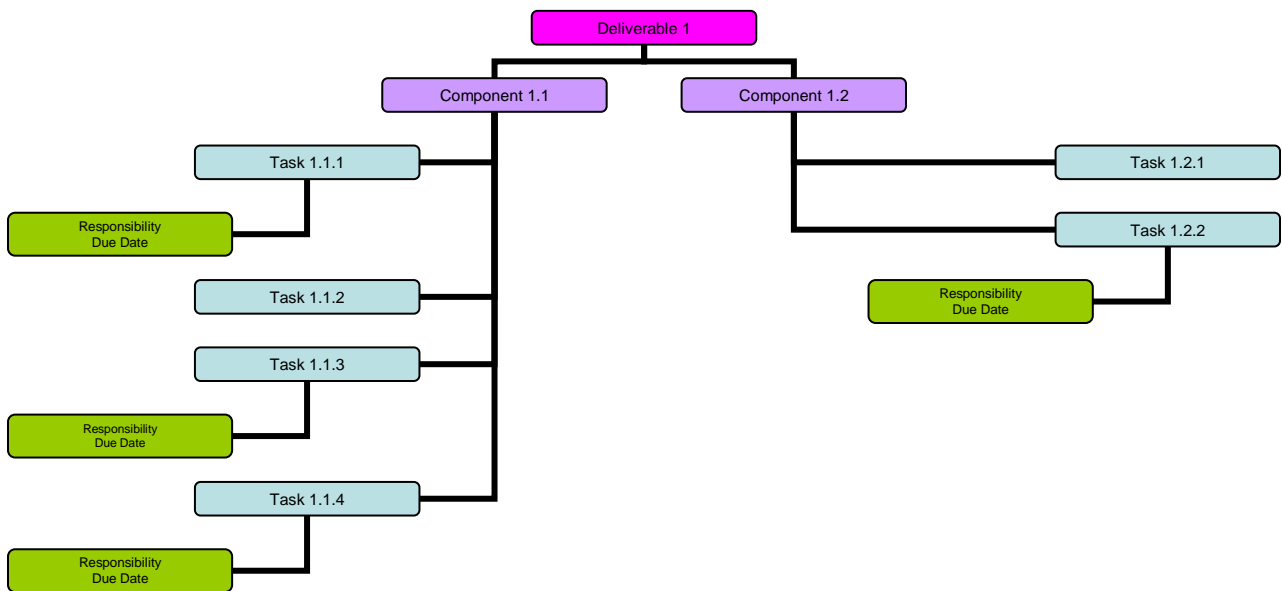
6. On a different color Post-It (blue!) start brainstorming all of the **tasks** that need to be accomplished to achieve or complete the **component**. **Be exhaustive!**
7. Place the **tasks** underneath the appropriate **components**.
8. Arrange the **tasks** in chronological order. Which tasks must be accomplished first?



9. Assign **responsibility** to a team member, and **due dates** for each **task** and **component**.



10. Once the WBS is complete, take a picture! Record the WBS in a Word Document, PowerPoint organizational chart, or by using project management software.



Assessment Project Challenges and Solutions

All projects have challenges, and assessment projects are no exception. What are some of the issues that have arisen in your projects, or that you foresee on the horizon? What tools and techniques are available to help meet these challenges?

Assessment projects may suffer from lack of time, staffing, software, and more.

Brainstorm some of the challenges that you face at your library, and we'll discuss some potential tools and techniques that you can use to meet these challenges.

Remember, your challenges are not yours alone! Share and discuss what you have learned with your group.



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Communication Styles

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- *International Abstracts of Human Resources* database: <http://www.humanresourcesabstracts.com/>
- Acton, G. Scott. "Great Ideas in Personality." Available at: <http://www.personalityresearch.org/>
Searchable resource of personality tests and theories. From the Rochester Institute of Technology.
- Revelle, W. "The Personality Project." Available at: <http://www.personality-project.org/>
Comprehensive list of psychology articles and essays about personality type. From Northwestern University.

Institutes that offer training and additional information, based on method:

Myers & Briggs Foundation (<http://www.myersbriggs.org>)

Excellent background information on the basis and uses for the Myers-Briggs Type Indicator tool.

- Background: <http://www.myersbriggs.org/my-mbti-personality-type/mbti-basics/>
- Applications: <http://www.myersbriggs.org/type-use-for-everyday-life/>

Keirsey Temperament Sorter (<http://www.keirsey.com/>)

Details the method and its uses across many different types of institutions. Much of the Keirsey method lays the foundation for the Temperament Research Institute.

- About the four temperaments: <http://www.keirsey.com/handler.aspx?s=keirsey&f=fourtemps&tab=1&c=overview>
- Essays on temperament: <http://www.keirsey.com/articles.aspx>

16 Personality Factors - Institute for Personality and Ability Testing

(<http://www.ipat.com/Pages/home.aspx>):

In addition to tools, provides white papers on assessments and strategies.

http://www.ipat.com/resources/white_papers/Pages/default.aspx

Temperament Research Institute (<http://www.tri-network.com/>):

Excellent website to learn more about the layers and factors that make up group communication and dynamics, as well as personality type.

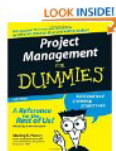
- Temperament Theory:
<http://www.interstrength.com/curriculum/temperament.html>
- Interaction Styles:
<http://www.interstrength.com/curriculum/interactionstyles.html>

Herrman Institute (<http://www.hbdi.com>)

Learn more about the Whole Brain Thinking approach to work and management, including project management. Become certified in HBDI or sign up to complete the personal assessment.

- Overview of HBDI:
<http://www.hbdi.com/WholeBrainProductsAndServices/thehbdi.cfm>
- HBDI for Organizations:
<http://www.hbdi.com/SolutionsFor/organizations.cfm>

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http://en.wikipedia.org/wiki/Work_breakdown_structure



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Haynes, Marion E. **Project Management from Idea to Implementation**. Menlo Park, CA: Crisp Publications, 2002.



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