

Exercise #4a

How Do We Plan for Project Success?

In this group exercise you will participate in a case study about issues that need to be discussed and resolved when leading a project planning meeting.

Instructions: Your group will be assigned one of the following roles in a case study about a library that is seeking funding from a governing body, such as a board of trustees, county commission, executive committee, or corporate board. Use the sheet marked “Planning to Plan Meeting Questions” to discuss and write answers regarding your role.

1. **Project Manager:** Responsible for the printed budget request getting into the hands of the governing board on time, under budget, at an accepted level of quality and with everyone still speaking. The request is in the form of a printed report in booklet form. Hires or assigns the right person for the right job.
2. **The Narrative Writer:** Write the “sales” information that accompanies the numbers.
3. **The Financial Writer:** Collects and organizes the numbers.
4. **The Designer:** Designs the report, including the type, color of the paper, design of the pages, and choice of artwork and cover art.
5. **The Copy Editor:** Hunts for mistakes in the numbers and the words and fixes them. Makes sure the numbers and the words match.
6. **The Managing Editor.** Supervises and coordinates the work of the two writers, the designer, and the copy editor, and coordinates with the distribution supervisor. Also arranges for the duplication of the final version of the report. Reports to the project manager. (On small projects, this person or committee might be the project manager, as well.)
7. **The Distribution Supervisor:** Coordinates with the managing editor to ensure the final version of the report is delivered to the printer and the duplicated reports are delivered to the governing body members on time.
8. **The Champion:** Ensures the status and credibility of the project and steps in to ensure compliance by people outside the project group, if necessary.
9. **The Arbiter:** Makes hard decisions quickly if the project manager is out of touch.