Project Management for Planners:

How Project Management is Like Adventure Motorcycling

Terry A. Clark, AICP, PMP
Susie Clark, Pillion Rider and Photographer
Introduction

• Combining four of my strongest passions:
  1. Planning
  2. Project Management
  3. Adventure Motorcycling
  4. My wife, Susie

• Introduction to project management and refresher of key concepts
Agenda

• Introduction
• Groundwork
• Initiating
• Planning
• Executing
• Monitoring & Controlling
• Closing
• Wrap-Up & Questions
# Introduction

<table>
<thead>
<tr>
<th>Project Title</th>
<th>Schedule</th>
<th>Duration</th>
<th>Cost</th>
<th>Deliverable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patagonia, Andes, Tierra del Fuego</td>
<td>Feb 9-26, 2013</td>
<td>18 days 2,500 miles</td>
<td>$$$$</td>
<td>1st motorcycle adventure</td>
</tr>
<tr>
<td>Alps, Vienna, Prague</td>
<td>June 12 – July 4, 2016</td>
<td>23 days 1,300 miles</td>
<td>$$$</td>
<td>1st couple adventure</td>
</tr>
<tr>
<td>Canadian Maritime Provinces, Newfoundland, Quebec</td>
<td>June 23 – July 23, 2017</td>
<td>31 days 5,300 miles</td>
<td>$$</td>
<td>Motorcycle and fly</td>
</tr>
<tr>
<td>Balkans – Romania, Serbia, Bosnia &amp; Herzegovina, Croatia, Slovenia, Italy, Montenegro, Bulgaria</td>
<td>Aug 21 – Sept 25, 2018</td>
<td>36 days 3,300 miles</td>
<td>$$</td>
<td>Longest duration, most exotic and challenging</td>
</tr>
<tr>
<td>Ireland &amp; Scotland</td>
<td>Sept 15 – Oct 12, 2019</td>
<td>28 days 1,560 miles</td>
<td>$$$</td>
<td>Family history</td>
</tr>
</tbody>
</table>
What is a Project vs. Program?

• **Project** – a **temporary** endeavor undertaken to create a **unique** product or service.
  • (with a definite **beginning** and **end** )

• **Program** – a group of **projects** managed in a coordinated way to obtain benefits not available from managing them individually.

Source: PMI
The “Triple Constraint”

Time

Quality

Scope

Resources

Source: PMI
Do These Three Things To Be A Successful Project Manager!

1. **COMMUNICATE**
everywhere and all the time

2. Start all of your projects with a **PROJECT CHARTER**

3. Create and use a **WORK BREAKDOWN STRUCTURE (WBS)**
What one thing do these activities have in common?

• Planning
• Project Management
• Adventure Motorcycling
• Traveling with your significant other

Risk Management
What is a Project Manager?

- **90%** of a project manager’s time is spent on communication to:
  - Project team
  - Upper management
  - Customers
  - Internal and external stakeholders

Source: The Gardner Group
Poor Communication Leads to Project Failure – “Drifty”

• “Ineffective communications is the primary contributor to project failure one third of the time, and had a negative impact on project success more than half the time.”

Source: The Way Forward, PMI, 2013
Groundwork
Why Do You Want to Be a Project Manager or Adventure Motorcyclist?

- Values
- Bigger than you
- Motivators
- Personal
- Sustain you during tough times
Getting Started
Continuous Learning – For Rookies and Veterans

- Get experience
- Learn the basics - volunteer
- Start small – church, Scouts, neighborhood
- Study
- Project Management Institute (pmi.org)
- Get certified
- It takes at least 10 years to get 10 years of experience
Shameless Plug

Project Management for Planners

Terry A. Clark, AICP, PMP

PMI - PMBOK

A Guide to the Project Management Body of Knowledge

SIXTH EDITION

PMBOK® Guide

Includes: The Standard for Project Management

APWA

Terry A. Clark, AICP, PMP and Susie Clark

Project Management for Planners Webinar - May 22, 2020
Initiating

• How long do we have?
• How much money do we want to spend?
• Where do we want to go?
• How are we going to get there?
• Are we going to rent a bike?
• How will we deal with money?
Project Initiation

Prepare a Project Charter

- A high-level overview of the project
- Budget
- Timeline
- Resources
- Final deliverable
  - Must have product
  - Output, not outcome
Project Charter

• Why is the project being done?
• Who are the stakeholders?
• What are the primary project objectives?
• What will be the final product or deliverable?
• The primary purpose: get management approval to proceed.
Ferry from Northern Ireland to Scotland
Survey – Which Are Project Deliverables?

- New Zoning Ordinance
- Safe Streets
- Parking Standards Document
- Better Playground Lighting
- Increased Affordable Housing
- Fun, Safe, Time Sensitive and Affordable Trip
Bosnia and Herzegovina

Bosnia and Herzegovina lies at the cultural crossroads of east and west. It was here where the Byzantine and Ottoman civilizations met the Roman and Austro-Hungarian ones, creating one of the richest and most diverse cultural heritage regions of southern Europe. It is also the only place in the world where you can find Orthodox and Catholic churches, a mosque and a synagogue side by side in the same square. Despite the image of Bosnia and Herzegovina’s past, it is actually one of the safest places in Europe.

Roads and Riding

Much of the country is covered by mountainous terrain, which together with good roads makes a great riding destination. This tiny country is tailor made for adventure and has a taste of the wild that is long gone in Western Europe.

Climate and Environment, When to Go

Bosnia has a mild and consistent central European climate. The best time to visit is from May to September. Bosnia is not a heavily traveled country, so does not get super crowded in the summer. Any time is a good time to visit Bosnia.

Sights, People, Food and Drink

As the crossroads of Austro-Hungarian and Ottoman civilizations, Sarajevo and Mostar are beautifully preserved medieval cities, the former with an excellent Turkish bazaar, the latter with a stone arch bridge as the centerpiece of a medieval old town. Though they tend to live in separate areas of the country. Sarajevo and Mostar (Bosnian: Bosanskij) are all of the same ethnic stock and physically indistinguishable. The people, especially in Sarajevo and Mostar, are working very hard to renew and show off the treasures their cities are and are most welcoming and appreciative of visitors. Bosnian’s Turkish heritage means that grilled meats are popular, by cevapi (minced lamb or beef) or burek, a meat or cheese baked into a flaky pastry.

Facts For The Traveler

| Capital city:  | Sarajevo |
| Population:   | 4 million |
| Land area:    | 51.129 sq km |
| Official language: | Croatian, Serbian (both very similar) |
| National currency: | Convertible Mark (KM), EUR is widely excepted |
| Religion:     | Muslim (44%), Orthodox Christian (32%), Roman Catholic (17%) |
| Time zone:    | Central European Time (GMT+1) |
| International dialing number: | +387 |
| Visa:         | Tourists from most countries (EU, USA, etc) do not need visa. A valid passport is required only. |
| Electricity:  | 220V, 50Hz |
| Electric Plug Details: | 🍕 |
Balkans Preliminary Route
# Project Budget

## Ireland/Scotland Trip Expenses

**September 15 - October 12, 2019**

<table>
<thead>
<tr>
<th>Date</th>
<th>Expense</th>
<th>Amount ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Travel</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Parking</td>
<td>$ 237.60</td>
</tr>
<tr>
<td></td>
<td>Airfare</td>
<td>$ 1,260.12</td>
</tr>
<tr>
<td>9/19/2019</td>
<td>Ferry Belfast-Cairnryan</td>
<td>$ 117.62</td>
</tr>
<tr>
<td></td>
<td>Motorcycle Rental</td>
<td>$ 2,889.04</td>
</tr>
<tr>
<td></td>
<td>Car Rental</td>
<td>$ 1,217.78</td>
</tr>
<tr>
<td>9/18/2019</td>
<td>Gas, BP Barker's, Bainbridge</td>
<td>$ 16.05</td>
</tr>
<tr>
<td>9/19/2019</td>
<td>Gas, BP, Biggar</td>
<td>$ 20.06</td>
</tr>
<tr>
<td>9/15/2019</td>
<td>Am Airlines, luggage, seat upgrade</td>
<td>$ 269.56</td>
</tr>
<tr>
<td>9/19/2019</td>
<td>Ticketing</td>
<td>$ 39.57</td>
</tr>
<tr>
<td>9/25/2019</td>
<td>Gas, Lochcarron</td>
<td>$ 14.89</td>
</tr>
<tr>
<td>9/28/2019</td>
<td>Gas, Stranraer</td>
<td>$ 10.52</td>
</tr>
<tr>
<td>9/28/2019</td>
<td>Stena Line</td>
<td>$ 121.01</td>
</tr>
<tr>
<td>10/12/2019</td>
<td>American Airlines, luggage</td>
<td>$ 182.55</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>$ 6,396.37</strong></td>
</tr>
</tbody>
</table>

**Bandit** $ 560.00  
**Cash** $ 678.53
Electronic Helpers

- Sprint International Service
- Local Wifi
- SPOT Gen 3 Tracker
- SpotWalla.com
- ABS, traction control, ride modes, EFI, TPMS, GPS,
- Google Blogger - https://terryandsooz.blogspot.com/
Overkill?
Don’t Use a Sledgehammer To Kill a Gnat

- PM software is a tool
- Managing the project is much more than managing the software
- Use the tool that fits your needs
- Remember they are just tools, not the project

Terry A. Clark, AICP, PMP and Susie Clark
Contract Management (motorcycle rental) Within A Project

- When to use contractors?
- Include the Contract Management process in the Charter, WBS, schedule and budget
- What are the contract deliverables?
- Reviewing and paying invoices
Work Breakdown Structure (WBS)

- WBS - a detailed project description.
- Always keep the deliverable in mind.
- Use the verb + object format.
  Example: write + parking standards
- Start general and become more specific.
- Keep statements short and to the point.
- Apply a consistent and simple numbering system.
WBS
“Fear Gear”

• Packing evolution
• Each adventure (project) has unique requirements
• Experience
Scheduling Public Involvement (Local Input)

- Public involvement must be planned and scheduled
  - Advertisements/Notifications
  - Meeting date(s) – milestones
  - Document revisions
  - Meeting notes and follow-up
  - Staff participation
- Plan time for gathering local input
Building a WBS

Ford engineers in Dearborn, Mich., used sticky notes to mock up the layout of a ventilator production
<table>
<thead>
<tr>
<th>Route #</th>
<th>Date</th>
<th>Depart</th>
<th>Location</th>
<th>Arrive</th>
<th>Hours/Miles</th>
<th>Hotel, Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>6/13/2016</td>
<td>Gainesville</td>
<td>Frankfurt/Heidelberg</td>
<td>12:50pm</td>
<td>4 hrs/137 miles</td>
<td>Get bike, phone card, cash; STORE BAGS AT AIRPORT</td>
</tr>
<tr>
<td>2</td>
<td>6/15/2016</td>
<td>Lech</td>
<td>Andermatt, Sw</td>
<td>5 hrs/141 miles</td>
<td>Gasthaus zum Sternen Gotthardstrasse 67, Andermatt, 6490, Switzerland - RESERVED</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>6/17/2016</td>
<td>Lech</td>
<td>Interlaken, Sw</td>
<td>4 hrs/120 miles</td>
<td>Chalet Emmitage - Panorama &amp;B - RESERVED - Wartbodendenstrasse 23, 3626 Hombach, Thun, Bern, Switzerland</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>6/19/2016</td>
<td>Martigny, Sw</td>
<td>Como, It</td>
<td>3 hrs/92 miles</td>
<td>Route du Corpspe, Martigny-Combe, Walls 1921, Switzerland - RESERVED - MUSMUS - AIRBNB</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>6/20/2016</td>
<td>Como, It</td>
<td>Mals, It</td>
<td>5 hrs/164 miles</td>
<td>Vista LagoVia Roma 25, Brunico, 22034, Italy - RESERVED</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>6/21/2016</td>
<td>Como, It</td>
<td>Heidelberg</td>
<td>4 hrs/135 miles</td>
<td>Hotel Post, Via Flora, 15, 39020 Gorenza 87, Italy - RESERVED</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>6/22/2016</td>
<td>Mals, It</td>
<td>Arabba, It</td>
<td>3.5 hrs/160 miles</td>
<td>Hotel Eovaldi, via mesati, 3, 32020 Arabba, Livainalongo Bi, Italy - RESERVED</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>6/24/2016</td>
<td>Villach, Aus</td>
<td>Villach, Bis</td>
<td>6 hrs/212 miles</td>
<td>Hotel Mosser, Bahnhofstrasse, 9, A-9500 Villach - Karnten, Austria - RESERVED</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>6/26/2016</td>
<td>Grossglockner, Aus</td>
<td>Heidelberg</td>
<td>4 hrs/138 miles</td>
<td>Stefan's 862 - RESERVED</td>
<td></td>
</tr>
</tbody>
</table>

**Shuttle from Heidelberg to Frankfurt**

Vienna 1080

**Vienna 1080**

**Vienna 1080**

**Vienna 1080**

Motorcycle - BMW R1200GS June 14-June 26 = $1,105 + $160 insurance + $300 deposit

Motorcycle at Stefan’s @ 20/yard
1.0 Prepare a Capital Improvement Plan

1.1 Collect Data
   1.1.1 Conduct Citizen Survey
   1.1.2 Review Existing Documents
   1.1.3 Document Revenue Sources

1.2 Analyze Data
   1.2.1 Develop Rollup Summaries
   1.2.2 Estimate Costs of Projects
   1.2.3 Estimate Future Revenues

1.3 Prepare First Draft
<table>
<thead>
<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dpt. Orlando 11:00a</td>
<td>Arv Frankfurt 12:50</td>
<td>Heidelberg to Lech, Aus 4 hrs/137 miles</td>
<td>Lech to Andermatt, Sw 5 hrs, 141 miles</td>
<td>Nufenen Pass/Café 4.5 hrs/120 miles</td>
<td>Andermatt/Interlaken</td>
<td>Lauterbrunnen Waterfalls Cable car</td>
</tr>
<tr>
<td>Fl# F17814: MCO To: BOS</td>
<td>Shuttle to Stefens BNB</td>
<td>Pension Daniel</td>
<td>Gasthaus zum Sternen</td>
<td>Oberalp Pass</td>
<td>Chalet Ermitage Panorama BNB</td>
<td>Chalet Ermitage Interlaken, Switz</td>
</tr>
<tr>
<td>69124 Heidelberg</td>
<td>3976764 Lech, Austria</td>
<td>Andermatt 6490</td>
<td>Andermatt, Switzerland</td>
<td>Grimsel/Susten Pass</td>
<td>Thun, Bern, Sw Switzerland</td>
<td></td>
</tr>
<tr>
<td>Stefens BNB Heidelberg, Germany</td>
<td>4:21 p Iceland Air</td>
<td></td>
<td></td>
<td>Triesen, Lichtenstein</td>
<td>Interlaken, Switzerland</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Gasthaus zum Sternen</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interlaken/Martigny Switzerland 3 hrs, 92 miles</td>
<td>Martigny to Como, Italy 5 hrs/164 miles</td>
<td>Como to Mals, Italy 4.5 hrs/135 miles</td>
<td>Mals, Italy</td>
<td>Mals to Arabba, Italy 3.5 hrs/100 miles</td>
<td>Arabba, It to Villach, Austria 3.5 hrs/139 miles</td>
<td>Villach / Grossglockner 2.5 hrs/92 miles</td>
</tr>
<tr>
<td>Route du Cergneux</td>
<td>Vista Lago</td>
<td>Hotel Post Via Vlora, 15</td>
<td>Dolomites, Piz Boe Mountain</td>
<td>Hotel Evaldo</td>
<td>Hotel Mosser</td>
<td>Heiligenblut Hotel</td>
</tr>
<tr>
<td>Wallis 1921 Martigny, Switzerland</td>
<td>Brunate Italy</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Ljubljana, Slovenia Trieste, Italy</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Grossglockner, Austria</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1-Jul</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Grossglockner, Aus to Heidelberg, Germany 4 hrs/138 miles</td>
<td>Shuttle to Frankfurt Austrian Air 2:50p #OS130</td>
<td>Mals, Italy</td>
<td>Mals, Italy</td>
<td>Vienna to Prague Austrian Air 12:56 pm #OS707</td>
<td>Prague, Czech Republic</td>
<td></td>
</tr>
<tr>
<td>Stefens BNB Heidelberg</td>
<td>Vienna, Austria</td>
<td>Vienna, Austria</td>
<td>Vienna, Austria</td>
<td>Prague, Czech Republic</td>
<td>Prague, Czech Republic</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Prague, Czech Republic</td>
<td></td>
</tr>
<tr>
<td>FL FI525 at 2230 FRA To: KEF</td>
<td>FI635 at 0725 KEF to BOS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Keflavik, Iceland</td>
<td>F17813 at 1400 BOS to Orlando</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Executing

Initiating → Planning

Monitoring and Controlling → Executing

Closing
Known Risks

• Insurance – travel and emergency evacuation
• Border crossings – Patagonia vs. Balkans
• Language – apps, attitude, openness
• Safety – ATGATT
• Weather
Unknown Risks – When Things Go Wrong in An Alps Tunnel

• Trust the process
• Momentum
• Fear
• Always look forward – you go where you look
• Stay between the lines
• Don’t overreact
Manageable Risks - Ride Your Ride
Monitoring & Controlling
Project Monitoring and Controlling – Make Adjustments

- Constant communication
- Visual real time checks
- Bluetooth intercom
- Sooz navigating and safety checks – Zagreb streetcars
- Color blindness
- Fatigue and dehydration
Minimize Distractions
Project Detours – Project Change

• Balkans road construction
• Unexpected challenges
• Do you stop and re-plan or do you continue on?
• Is the variance from the plan big enough to make a change?
Project Reporting

Project Dashboard

Summary
- On target
- Small resource issues

KPI Status

By Project Area

- Workstream 1 - on target
- Workstream 2 - on target
- Workstream 3 - Budget required
- Workstream 4 - Resource issue
- Workstream 5 - on target

RISKS
- New Competitors [owner: Howard]
- Supply chain [owner: Jane]

ASSUMPTIONS
- Finance will continue to 2013
- Resource in Workstream 4
- Signoff needed for Widget plan

ISSUES
- Widget supplier is going out of business - must source new supplier

23-Jun-13
www.Business-Docs.co.uk

Monitoring & Controlling
Closing

- Initiating
- Planning
- Executing
- Monitoring and Controlling
- Closing
Project Closing - The Deliverable “Walk Through”

- Items to defer
- Did we accomplish what we set out (the deliverable)?
- Packaging
- Public celebration
- Perfection is not an option
- Lessons learned
Summary

• Prepare – conduct research, continuous learning
• Review your values/goals
• Project Management Processes:
  • Initiating
  • Planning
  • Executing
  • Monitoring & Controlling
  • Closing
• Enjoy the ride!
Questions/Follow-up

Terry and Susie Clark
terry@staffconnections.com
561-346-6392
staffconnections.com