

Title: Project Management Tools for Genealogy

RootsTech 2016 Presentation Proposal

Prepared by:

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Bio of Speaker

Cori Zuppo, PhD, SPHR, GPHR, holds a bachelor's degree from Ohio University in Conflict Analysis & Resolution, a master's degree from The George Washington University in Educational Leadership & Administration and a PhD from Indiana State University in Technology Management, specializing in HRD/IT. Dr. Zuppo has a background in corporate HR/Legal and has been a professor at Bowling Green State University, University of Maryland University College and Marion Technical College. A couple of her favorite pastimes include learning about new tech tools, "breaking" apps in Beta and all things genealogy.

Cori has designed and taught a variety of interactive online, blended and face-to-face courses ranging from associates to master's levels in the areas of business management, information technology and engineering technologies. She has facilitated and presented at national and international academic conferences and is a published researcher. Cori is a native of Ohio with German, Irish, Italian, English & French ancestry and is working toward attaining PMP (project management) and CG professional certifications.

Description

Learn how to organize and manage complex family genealogy projects using 5 basic project management tools, including a bonus tip sheet for video recording & video meetings.

SUMMARY

The presentation will open with a lively, animated video (created by the speaker) which explains:

- Managing family research can be exciting & messy; excitement can lead to enlisting others' participation, which is great!
- But what to do about the dilemmas of a team project such as communication, budgeting, managing scope, documenting progress, sharing and storing [everything!]
- The answer: project management tools!

Objectives

At the end of this presentation, attendees should be able to:

- document a project and explain the importance of scope
- outline roles & responsibilities of project team members
- set up a budget and a plan for communication
- explore simple cloud-based tools for managing genealogical projects
- begin using video and video conferencing for documenting progress and sharing results

Is it a project?

- Use interactive roulette wheel graphic to demonstrate characteristics of a project
- Template #1: Documenting project (charter) for clarity and to avoid misunderstandings
- Template #2: Budget (it's very easy to ignore the need for a budget!)

Who ya gonna call? Scope Busters!

- Use graphic to demonstrate good, better, best scope statements, including tips to guard against scope creep

Roles & Responsibilities

- Template #3: Who's on the team and what are their roles/responsibilities?

Meetings are dead. Long live meetings!

- Template #4: Communication plan
- Template #5: Script/storyboard outline for use with video/video chat for communications and documenting project progress (e.g., Skype, ooVoo, Google chat)
 - Show example YouTube video on chosen ancestor (under 5 minutes)
 - *Bonus:* Tip sheet for video meetings

Sample Project Plan & Tools

- Use speaker's own sample project plan to demonstrate Trello and Asana

Closing, Q&A

- Reiterate problems/solutions and templates (with URL for later retrieval)
- **Always be sure to celebrate project successes!**