A Guide for the Project Manager

Overview

The Project Manager is a critical role, not only for your Project but for SHARE as a whole. Enterprise computing professionals are more important than ever for the survival of SHARE, and for the growth of the platform. SHARE is more than just the two major conferences each year – SHARE is a year-round community where enterprise IT professionals can gain industry knowledge, build up their skill set and network to find solutions to benefit their organization. The Project Manager is the "face" of the project and signifies the importance of your project's focus area to all mainframe professionals. As Project Manager, you are responsible for leading, representing and organizing the Project. Your role is to set goals for the project, manage the volunteers and make sure things get done. This is a year-round volunteer role, so make sure you are aware of the time commitment required ahead of time.

Roles and Responsibilities

What you do

Your main responsibility is to manage the core team of volunteers so that everyone is working toward the project goals throughout the year. This includes organizing the team(s), leading frequent meetings, setting up tasks and deadlines that align with your goals. Delegating tasks to your volunteers is very important. Coordinate with your volunteers, other projects, other programs, vendors (IBM and others), SHARE staff (also known as Smith Bucklin and Associates), and various levels of SHARE Management: Board of Directors, SHARE Senior Management Team (SSMT), SHARE Management Team (SMT), and Operations. Communicate up, down, and sideways

Manage

Managing is not telling someone how to do a task your way. Managing is inspiring someone to do a task the best way they can, sometimes steering them along the way. Consider it mentoring. Then recognize if you need to step in. You also need to be able to make decisions and set goals.

Delegate

Do not learn the hard way that delegating is crucial in being a successful and happy Project Manager. Always remember that your team is there to help you – and they are there to work on and volunteer for what needs to get done. And if not, then maybe they should not be a team volunteer. Be specific when you delegate tasks and ensure deadlines are clear. Maintain the living task document to help manage the responsibilities and to hold people accountable. Make sure tasks align with the project's goals

Coordinate

Make sure your volunteers update their own SHARE profile. Make sure SHARE HQ and your Program know who your volunteers are. Make sure your schedulers are defined to ConFex.

Communicate

There will be times when you feel overloaded with emails and information that you receive regarding your project. People who want to get more involved, new members, interview requests, SHARE Requirements, Program Manager Information requests, deadline reminders, emails from the SHARE staff, SHARE Board

related tasks, university/college liaisons, member emails, etc. And just when you think you have accomplished something and can take a breath, there is something else!

Your project is part of a Program within SHARE. You will now be on the Program emails. You will now be the person that the SHARE staff emails regarding any questions or initiatives your project is involved in. You will be the person that people around the world will email regarding any questions they have about your project. You will receive all this information from above and should try to pass it to those on the core team. Anything that can be passed on to your team for input, for help, for task management – pass it on.

Maintain a distribution list of your volunteers. Maintain a list for the Program key volunteers – the Program Managers, the other Project Managers, the other schedulers, etc. Also maintain a list of critical SHARE staff contacts – for your questions about the listserv, your project's website, logistics, SHARE discounts, SHARE in general, deadlines, project initiatives, etc.

What your volunteers do

For your project, the core team is a huge factor in the success of the project. A project requires year-round involvement and the volunteers need to be active throughout the year. At a minimum, you should have one Deputy Project Manager, three Project Officers, and one IBM Representative. Besides the titled volunteers, I think it is important that as you go forth as a project: you need to have task-oriented volunteers rather than more titled volunteers. This will help spread the work without involving too many people at the core team level that could possibly make things more difficult when making decisions. This will also help to grow a new generation of ribbon wearers for the future of the project.

The typical project roles might include the scheduler/lab coordinator, listserv manager, member list manager, communications forum leader, mentor program leader, committee leaders, web page monitor, and Session Chair people. There may be more or less depending on the current initiatives. Make sure these roles are clear and that the volunteers are dedicated to their assigned roles and tasks. Make sure they are honest and able to work towards the goals of the project – if they can't step up to the plate, they need to let you know as soon as possible.

The IBM Representative volunteer role may be one person, or you may have a Lead IBM Rep and one or more IBM Reps. This volunteer role is unique because besides volunteering for the project, the IBM Rep is also your liaison between your project and IBM. This means that it is their responsibility to determine how to leverage this relationship in order to benefit the project. The IBM Rep should be a positive influence on IBM regarding technical or non-technical issues that are important to your project members. It is your job to make sure the IBM Rep is not abusing his/her role and to make sure your project maintains a positive relationship with IBM through your Rep.

Project Monthly Calls

All projects should try to hold monthly calls for their volunteers and members. The calls could be a conference call or a webinar, depending on the technology available for your project. The agenda for the calls needs to be sent out no later than the day before the call. For each call, try to update the agenda as much as possible. It can be difficult sometimes coming up with interesting things to cover each call! Try to go over any SHARE Project items in the beginning – discussing progress as you move towards the next SHARE, or reviewing how the previous SHARE went.

Review the goals that have been set for the project. Try to solicit ideas from the attendees on session topics, discussion questions, etc. The more they are involved, the less you have to talk! A guest speaker for the call can make the call interesting and worthwhile for the volunteers and members. Discussing something that is a hot topic or a critical topic in the technology of your project's focus can add value to your project. Whether there is a guest speaker or not, try to come up with 1-2 discussion generating questions.

During the meeting, make sure you have a volunteer to take meeting minutes for the call. It can make for a hectic call if you have to host and take notes at the same time. The note taker will send you the minutes after the call.

Listserv

You should designate 1-2 volunteers to be the listserv coordinators. They are responsible for sending out the agenda and meeting minutes for each call, and for any other emails that come up. Try to send them the agenda at least 2 days before the call so they will have time to send it out at least one day in advance. Then send them the meeting minutes as soon as you can. If there is a non-monthly call email that needs to be sent out, be sure to have them send the test to you before it is sent out, so that you can review the email and check any links.

Documents

There are many important project documents that have been collected over the years. These include the monthly call agenda and meeting minutes, the task list, the highlights flyer, the signup sheets, the session chairs, the project reports, the session abstracts, the session workbooks, photos, the project opening, project volunteer award template, project PowerPoint template, project team notes, etc. You should make sure you have all of these that you need as the Project Manager. And if there's something you were wondering about what your project discussed at SHARE in xxxx, just ask and the previous Project Manager will probably have something archived.

Team Calls

There should be many team calls between SHAREs. There should be quite a few immediately following SHARE and many the month before SHARE. Make sure you have an agenda for the call and that the project's goals are clearly defined. Keep the core team honest and responsible for their tasks. Make sure deadlines and tasks are clear, and update the task document after the call. Take notes to send out to the team following the call.

Scheduling

Before each SHARE conference, you work with the Project team to arrange the schedule for your project's sessions. The earlier you begin the initial planning, the better. Collect ideas first, get speakers second. When you are thinking of sessions, focus on new content that is important and interesting to your project areas of focus. Don't be afraid to say no to ideas that you feel are not appropriate or are not interesting in the slightest! Prioritize session ideas because there may not be enough slots for all of them. If someone has a session idea, ask them to flesh out a rough abstract for the session.

SHARE has moved to ConfEx. You will need your own ID and pass code. Your Program Manager will provide the room assignments. Put sessions into rooms before the Scheduling Summit. Provide input to the Program Manager so they can negotiate for you at the Scheduling Summit. For each project, the number of prime time session slots will vary. Be sure you are clear on the number of sessions your project will have for the next SHARE so you can plan accordingly.

Lab Coordinator

This volunteer is the person to handle trying to get the lab scheduled. Speakers are not permitted to schedule their own labs. When you receive the email from the lab coordinator regarding the lab, you should be prepared to respond immediately so that we can get the most desirable time slot.

The Conference Event

Before the Conference

Among the project's core team, find out who is attending. Try to ensure speakers are still attending. Know how to contact your volunteers and speakers. Make sure they know how to contact you.

Visit the Volunteer Resource Center web page for Conference related information: http://www.share.org/Volunteers/VolunteerResourceCenter/tabid/400/Default.aspx.

Monitor the proceedings and encourage speakers to get their presentation(s) submitted in time to be viewed before the Conference begins. This gives attendees a chance to print a copy if they really need to have a piece of paper with them. It is optional for speakers to share their material with SHARE, it is not required.

Decide where the project dinner/event will be held. Project dinners are not required, but they are a great way to get to know project members, recruit volunteers, and to get a better idea of what your project goals should be. Designate a volunteer to take care of the details.

Prepare the necessary documents to print and take with you (or designate): the project signup sheet, the project highlights flyer, the chairperson document, the volunteer award, the project opening, etc. Make sure you upload presentations for the sessions that you will be responsible for: the Project Opening, the project dinner, and the Project Planning session. Make sure the project banner or any other project paraphernalia will be there.

Plan your SHARE schedule. As Project Manager, it is very important that you know where and when you need to be. You should plan to be at all the SHARE receptions, Team Time, your project's sessions if possible, the general session, the project dinner, the Program opening session and the volunteer lunch. Host team calls to make sure the core team is all set for the conference.

At the Conference

Find out who is there. Sometimes a volunteer or speaker gets wrapped up in their own life and ignores telling you their plans changed and they are not attending. Sometimes weather is the unavoidable cause. You should pick up the session evaluation envelopes at the Volunteer PC Workroom on Sunday. There might be SHARE-generic Chair Checklists you can stuff into the envelope.

Go to registration and collect your badge, ribbon(s), and Speaker pin. You should always be listed as a speaker, if not a full session of your own then at the Project Opening. Attend Team Time. Take notes, so that you can pass information to the volunteers who were unable to attend.

Start thinking about which volunteer(s) are exceeding your expectations. Be prepared to praise in public by using the Recognize A Valiant Effort (RAVE) form, available on-line and at the Speaker Support room, which is where you pick up the pin as well. Sometimes you have a volunteer that even surpasses RAVE, discuss a Book Award with your Program's Manager. If possible, do this early so they can use it. Remember to praise in public, try to mention this at the Project Dinner. Or of course, you can reward someone with the Project volunteer award!

Attend your Program's Keynote to learn about any SHARE-generic information not presented at Team Time. This could be listed as an administrative session, a working session, a z/OS keynote, or even a Program Opening.

Host your project's Planning session and working session. You should encourage your ribbon volunteers and other volunteers to attend this session. You might want all of your speakers to attend. You should have all chairpersons assigned by the end of this session if possible. Make sure your volunteers know

how to reach you if there is a problem. This is a good time to make sure you, and SHARE, know how long your volunteer(s) have been volunteering.

Longevity awards are done during the Summer Conference event. Get the names of the volunteers that will be able to attend the Volunteer Luncheon on Thursday (assuming there is one). Pass the NAMES up to the Program Manager. Some volunteers help more than one

Program/Project and need not be double, triple, or quadruple counted. Names are better than numbers.

Schedule who will assist at the SHARE Receptions. Attend the Meet The Projects Reception. Make sure the project banner and signup sheets are set up. Claim a table, and set it up. Better yet, delegate this important task to a volunteer! Monitor the proceedings and encourage speakers to get their presentation submitted in time to be included. It helps if you do a little speech at the Project Opening to introduce the project and the volunteers, state the goals and objectives, and do some recruiting. Sell SHARE's benefits: networking with people, volunteering, influencing vendors (requirements are just one way, closed sessions are another), presenting user experiences of their own, and anything else you can think of. Point out that the session evaluations are important and comments related to the session or SHARE are taken seriously. They are scanned so filling in the bubbles properly is important. Turn the session over to your keynote speaker.

Attend sessions. You did come to learn, right? But at the same time, try to keep an eye on your own project's sessions. Keep your ears open for comments, good or bad. Solicit topic ideas. Recruit for volunteers, for chair person, for speaker, for helpers, etc. Host a Closed, informal project administrative/working closing session if you want.

After the Conference

Ask the SHARE Team (sharehq@share.org) for the scanned comments. Do something about them. Pass any SHARE related comments up the chain of command. Send each speaker their comments. They may not have had an opportunity to read the comments immediately after the session was presented. You will be responsible for writing the Project report to send to the Program Managers. The report is a somewhat detailed review of how SHARE went and you should include any important project updates. Refer to any new initiatives your project may be working on and comment on anything else you think is important.
Send the report to the Program Manager(s) – the deadline is usually two weeks after SHARE. You might solicit input from your core team for the report.

Monitor the proceedings and encourage speakers to get their presentation submitted in time to be included for the DVD. Consider the Thursday following the Conference event to be the deadline. This leaves an additional day for last minute corrections. Point out that the PDF they should upload may include their speaker notes in order to provide additional benefit to SHARE members. Speakers can upload a better version at any time and they should to delete the older version, as well. They have no control over what is in a PDF if they upload source. Encourage them to create a PDF and upload that.

The session Chairperson should get the name of the speaker's manager and send them a thank you letter for letting the speaker present. Consider yourself elected if the Chairperson is not sending that thank you to the speaker's manager.

In between Conference Events

Remember that SHARE is more than just the two major conferences each year – SHARE is a year-round community. Keep up communication among the core team. Keep the monthly calls going strong. Keep the living task document up to date. Make sure the goals of the project are clearly defined and realistic. Communicate with SHARE HQ about any initiatives that might have been discussed at the previous SHARE. Sometimes, the Project Manager is the only person keeping the momentum going on some of the important to-do items, plus the momentum for the whole project.

• Keep recruiting volunteers – you never know when a volunteer will decide to fall off the planet and you will need to do something to make sure the tasks he/she was responsible for are taken care of.
• Keep recruiting project members. You should work with your team to identify vendors that correspond with your project's focus area – these vendors may be more likely to employ professionals interested in your project. If the initial interest is already there, you will have an easier time to recruit them as members and potentially grow them into volunteers.
• Keep trolling for topics.
• Keep trolling for speakers. There have been many comments praising User Experience sessions. The problem is that the general attendee does not want to be the user giving the presentation. Work on them.
• Review sessions and determine if any are candidates for the SHARE eLearning initiative.
• Make sure the members list is current at all times – this should be delegated.
• Make sure the volunteers for the communications forum are watching the posts.

Make sure you do not get overwhelmed! Sometimes, the role as Project Manager will seem easy and it will seem like everything is going smoothly. And other times, you will feel like you are working until 2 am every night to ensure things are getting done. After your first 2 am night – see what else can be delegated and get it off your plate. Don't let your volunteers be lazy. Sometimes delegating is hard because in order to pass off a task, there may be a lot of training and explaining involved, so it seems easier to just do it yourself. So be prepared to do some training, but also be prepared for the volunteer to put his/her own spin on the initiative/task. It may come out better than you initially thought.

When in doubt, ask for help. And be prepared to come to the realization that sometimes, things just won't get done. Things will go on and it's important to realize that you did your best. When should you stop being the Project Manager and let someone else come into the role? Whenever it is time to pass on the role, you will just know.

In Closing

It is important to remember that you lead a team – be sure to take a moment to say a personalized thank you every once in a while to each volunteer who has contributed to the project. As we know, volunteering comes with no financial reward, so speaking words of appreciation goes a long way. Whether through an email, a card in the mail or a phone call – encouraging your volunteers and saying thank you will mean a lot to them.

And finally, I wish you the best of luck as you step into the role of Project Manager. It will perhaps be the most personally fulfilling volunteer role you will ever have the chance to experience. I know that, despite the difficult times, I really did enjoy all the challenges, responsibilities, and opportunities that this role brought to me. I have grown a lot as a volunteer, as a leader and as a person new to the enterprise IT world. I'm sure you will grasp the chances to grow as well. I am confident that under your leadership, the project will continue to grow, succeed and make an impact for mainframers around the world.