CONNECTING: PEOPLE, IDEAS, OPPORTUNITIES

Katherine (Katie) Roberson | PMI Rio Grande Chapter

MAY 18, 2024
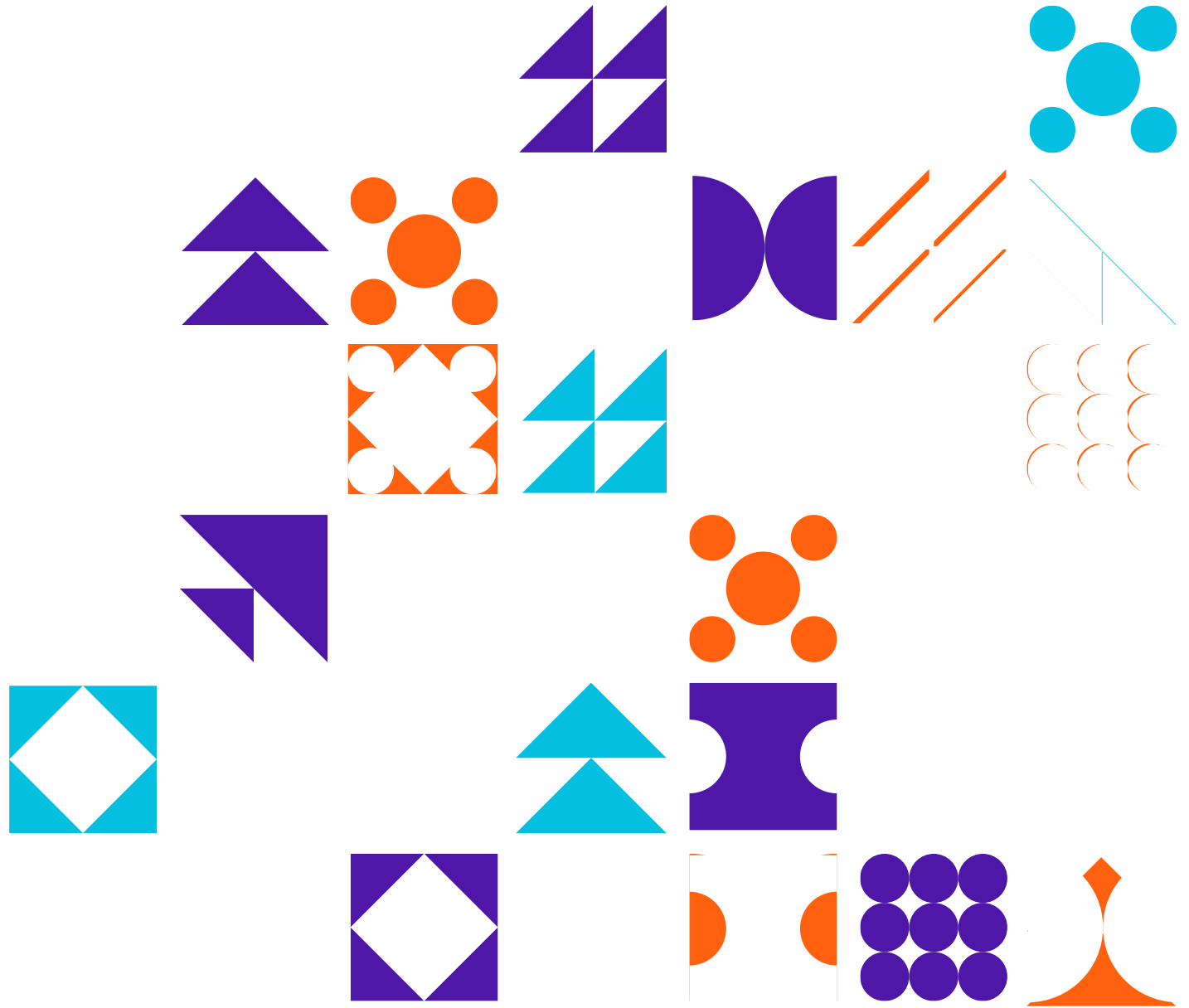
Play with Passion

Play with Fire

Breathing New Life into an Old Standby: Email Marketing for Chapters

Darren McNeil, PMP

PMI Orange County

Hybrid Events: Bringing Together PMI Members Locally & Virtually

Bhanu Viswanadha, PMP, RMP, DASSM and

Rajat Shah, PMP, PMI-ACP PMI Silicon Valley

Back to In-Person: Lessons Learned & Future Strategies (programs/events)

Paul Lovelis, PMP

PMI Tucson

Volunteer Engagement Strategy

David Doan, PhD, MBA, RN, BCMAS, PMC-II, PMP, CSM, CSPO

PMI Los Angeles

Empowering University Students as the Next Generation of Project Managers
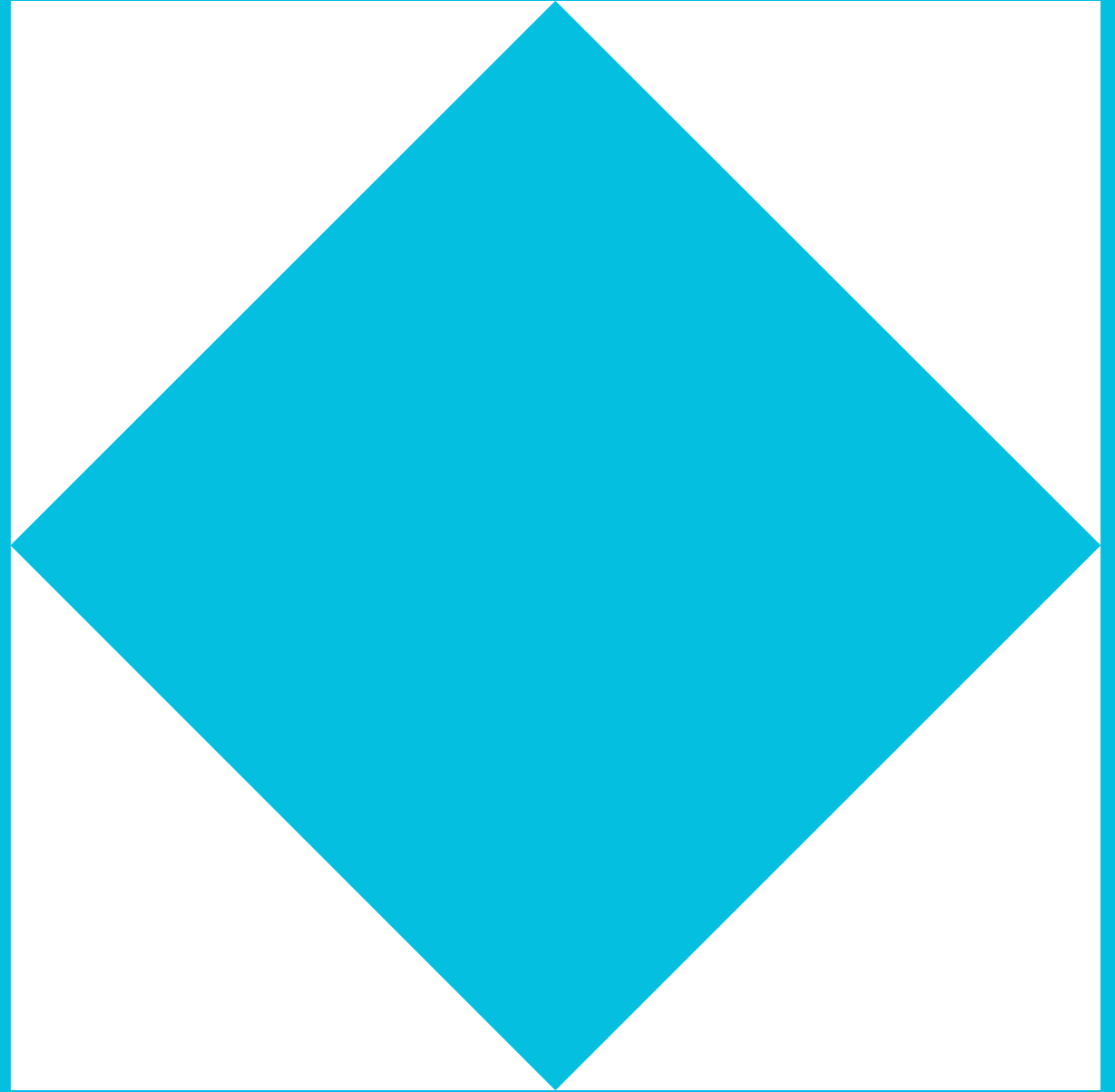
Carin Kaltschmidt, MBA, PMP

PMI San Francisco Bay Area

A successful person finds the **right place** for himself. But a successful leader finds the **right place** for others.

- John C. Maxwell

Purpose: I want you to walk away inspired, rejuvenated, and ready to make some changes in your chapters that connect people, ideas, and opportunities.

WHO AM I?

Katherine (Katie) Roberson

- Facilities Project Manager

- Previous PMO Manager – UNMH IT

- Finance. . . A long time

- Volunteer Work
  - Junior League of Albuquerque; VP Communications, VP Training, New Members
  - Music Guild of New Mexico, VP Communications
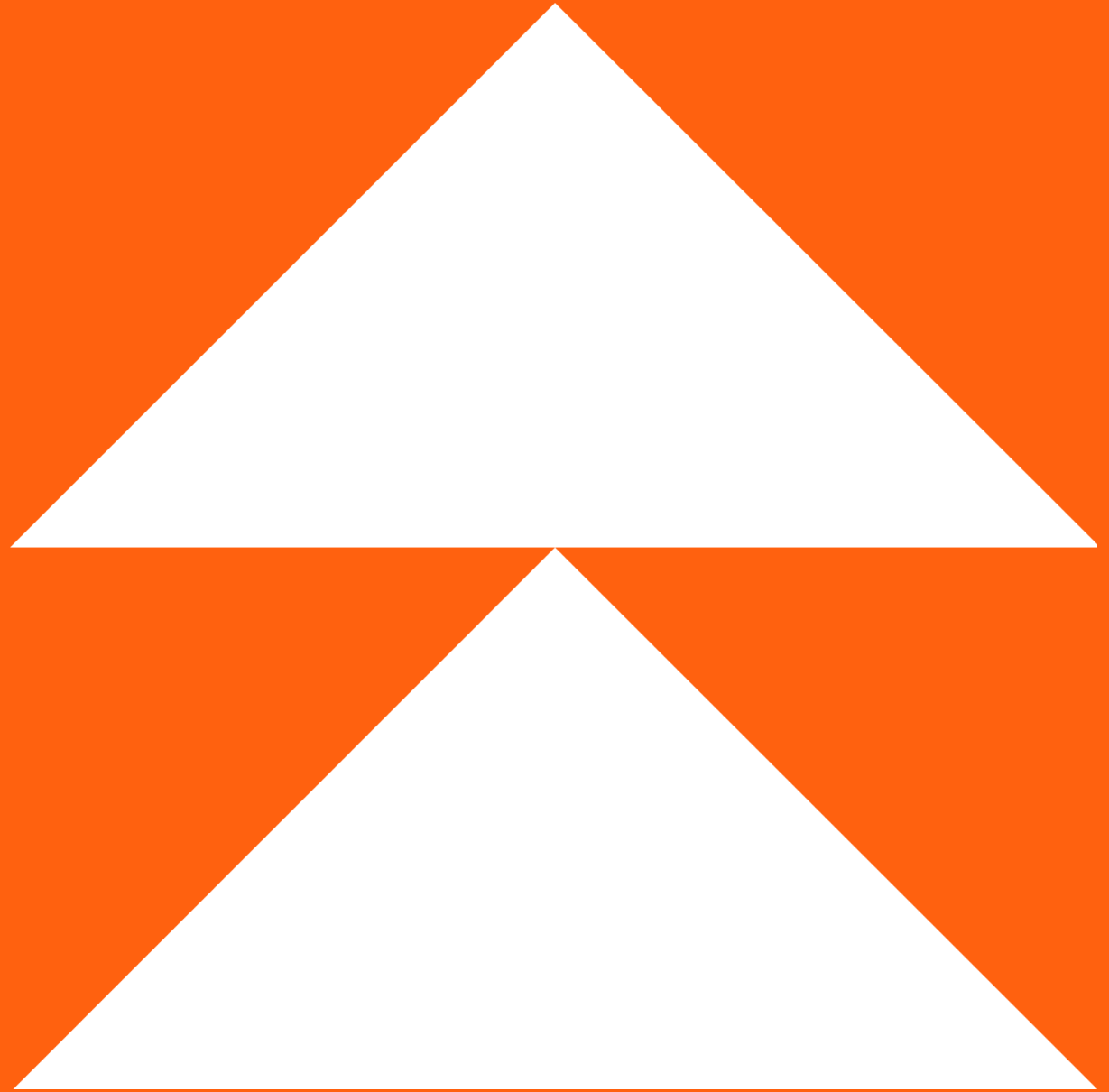 - Eldorado High School Choir; President, Treasurer

PMP

PMI-ACP

CSM

Green Belt Lean Six Sigma

Prosci Change Management Certification

CENTRALIZED SPACE
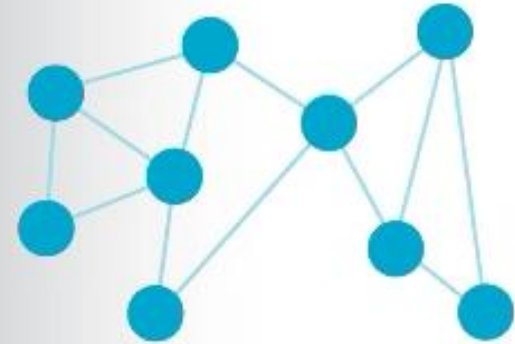ADVENTURE

Space Management Models

CENTRALIZED MODEL

Centralized strategic management is when all decisions are made by a single body in the organization and direction is purely top down.

HYBRID APPROACH

Sandia uses a **hybrid strategic management approach** with centralized and de-centralized planning.

DECENTRALIZED MODEL

De-centralized strategic management is when all decisions are delegated throughout an organization with little or no integration across decisions.
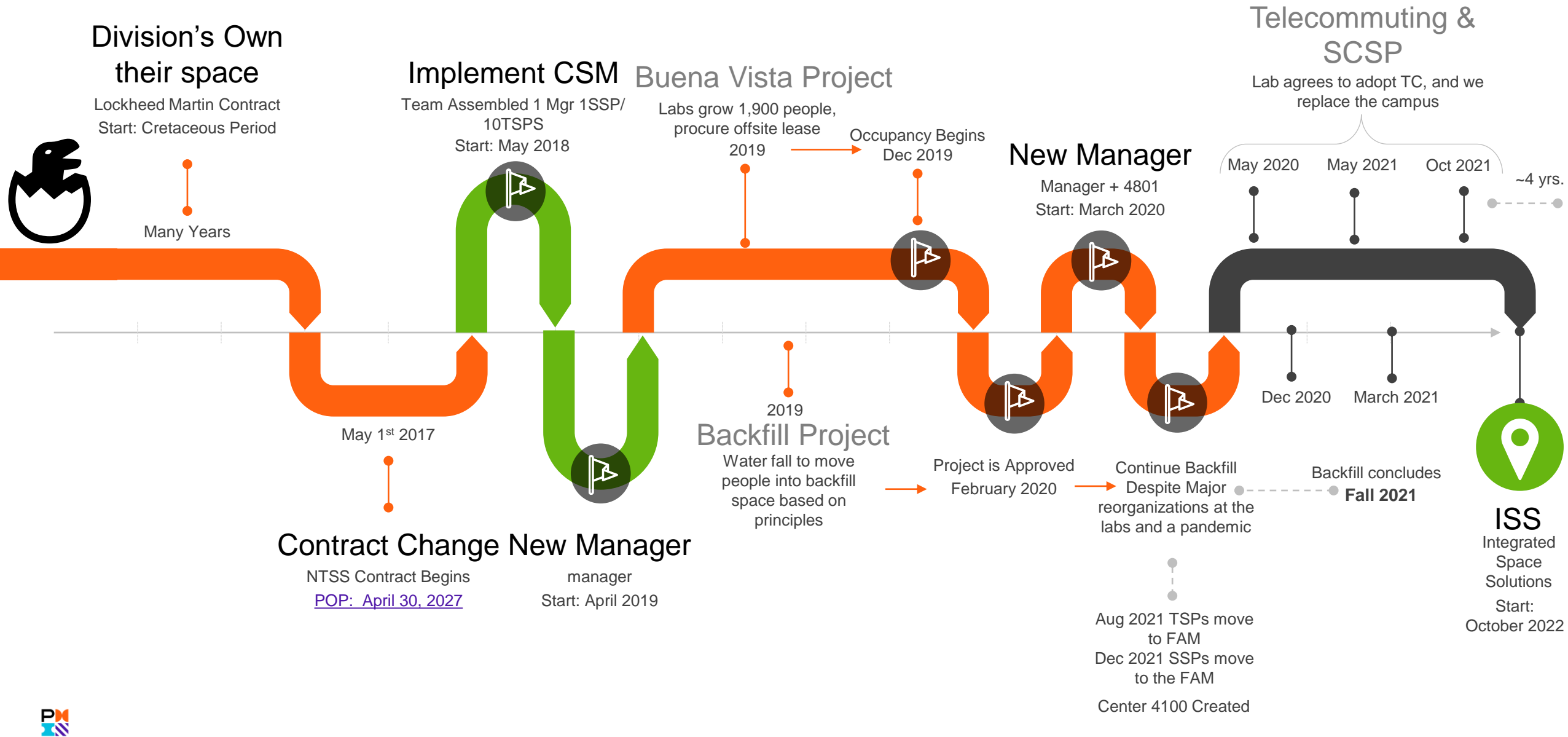
Sandia Space Model: Divisional

In the beginning. . . .there were 4

History of Space Management at SNL

Division's Own their space
Lockheed Martin Contract
Start: Cretaceous Period

Many Years

Implement CSM
Team Assembled 1 Mgr 1SSP/10TSPS
Start: May 2018

Buena Vista Project
Labs grow 1,900 people, procure offsite lease
2019

Occupancy Begins
Dec 2019

New Manager
Manager + 4801
Start: March 2020

Telecommuting & SCSP
Lab agrees to adopt TC, and we replace the campus

May 2020   May 2021   Oct 2021   ~4 yrs.

May 1st 2017

Contract Change
NTSS Contract Begins
POP: April 30, 2027

New Manager
manager
Start: April 2019

2019
Backfill Project
Water fall to move people into backfill space based on principles

Project is Approved
February 2020

Continue Backfill Despite Major reorganizations at the labs and a pandemic

Backfill concludes
Fall 2021

Dec 2020   March 2021

Aug 2021 TSPs move to FAM
Dec 2021 SSPs move to the FAM

Center 4100 Created

ISS
Integrated Space Solutions
Start: October 2022

Integrated Space Solutions 4829

ADDITIONAL RESOURCE SUPPORT

DIVISIONAL SSP

ENGAGEMENT

Integrated Space Solutions Manager

TYPOLOGY SSP

PROCESS PLANNING

Demand Signal Team
- Five divisional planners (M+ ME)
- One Utility planner
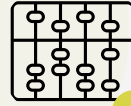
Data & Metrics Communication Team
- Two team members + Matrixed Support
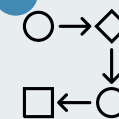- Dashboards/ Website

Project & Change Management
- One (awesome) PM

Supply Signal Team
- Five typology planners
- High Security, Storage, Lab, etc.

SOUL/ Tririga
- Hiring one + Matrixed Support
- Owner of Space database
- Process Coordination of strategic space requests

Leadership & Support Team

ISS Support

- Operations Lead
- Project Manager
- Admin Support

Manager, 4119 Integrated Space Solutions

Data Analysis & QA

- Data Quality Assurance
- Data Facilities Technologist
- Coordinator
- Data Analyst
- Coordinator

Typology Planners

- High Security SSP
- High Security TSP
- Laboratory SSP
- Storage SSP
- Bridging SSP
- Reservable SSP
- Utility / ESD SSP
- Divisional TSP (+ESD)

Specialty & Typology Space Support

Space Program Support

SSC	ND	1K / 10K	3K / 6K / 11K	4K / 5K	8K / 9K
WCC Triage Work Order Technicians	Divisional SSP Division 7000, Center 2200	Divisional SSP	Divisional SSP	Divisional SSP	Divisional SSP
SSC TSP	Divisional SSP Divisions 200, 300, 500, 20000	Divisional TSP 1K	**TSP Backfill** Divisional TSP 3K, 11K	Divisional TSP 4K	Divisional TSP 8K
SSC TSP	Divisional TSP Division 7000, Center 2200	Divisional TSP 10K	Divisional TSP 6K	Divisional TSP 5K	Divisional TSP 9K
	Divisional TSP Divisions 200, 300, 500, 2000 (+ESD)				

Integrated Space Solutions
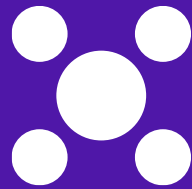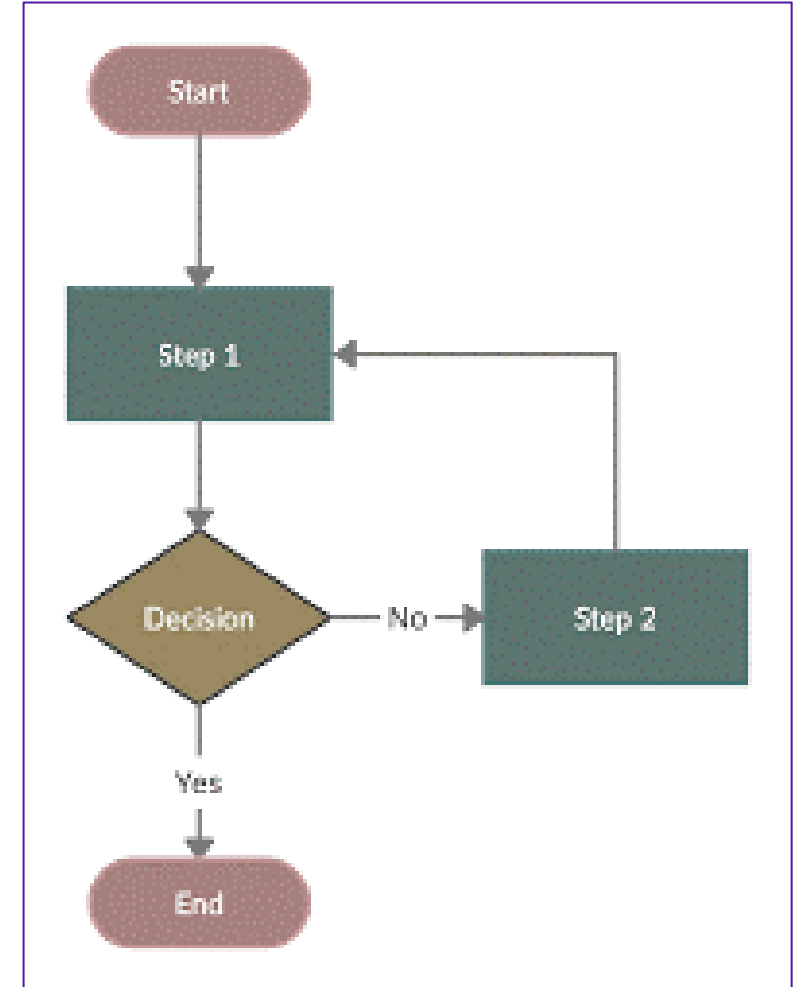
HOW DID WE GET THERE?
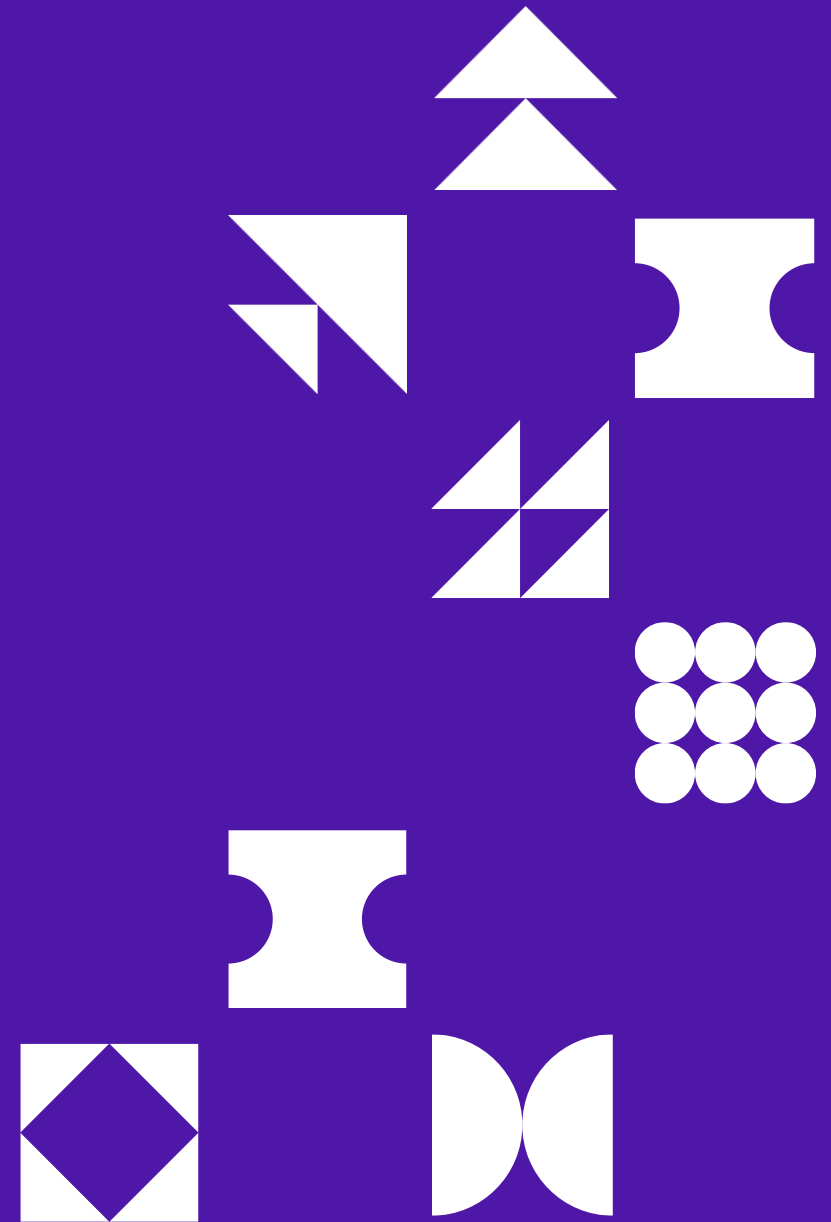
Building a Team for Centralized Space

Sandia National Labs

- **Team strategy**
  - What did we want to accomplish
- **Voice of the Customer**
  - What were the requesters saying?
  - What were the employees saying?
- **How to Structure for efficiency**
  - Process Improvement
  - Journey Map
  - Integrated Decision Making
- **Space Solution Center & Divisional Teams**

Strategy: Changing Space Management Models
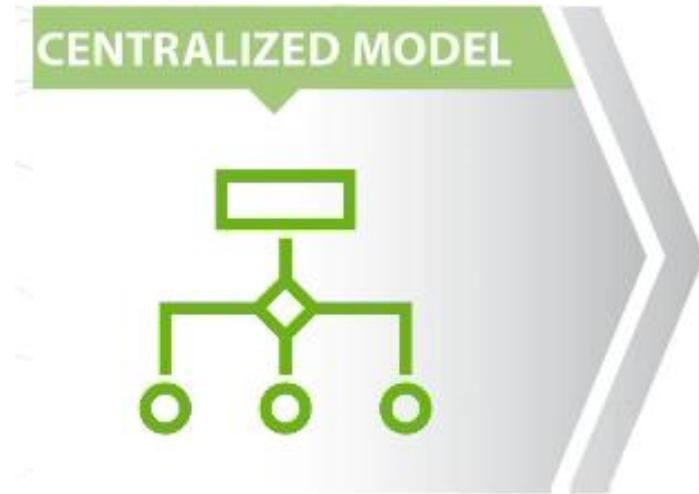
CENTRALIZED MODEL

Centralized strategic management is when all decisions are made by a single body in the organization and direction is purely top down.

2023 & forward

HYBRID APPROACH

Sandia uses a **hybrid strategic management approach** with centralized and de-centralized planning.

Unintentionally~2018- 2022
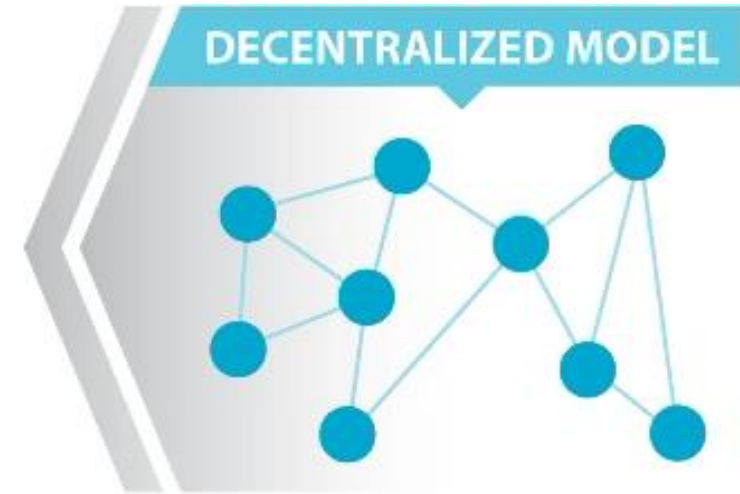
DECENTRALIZED MODEL
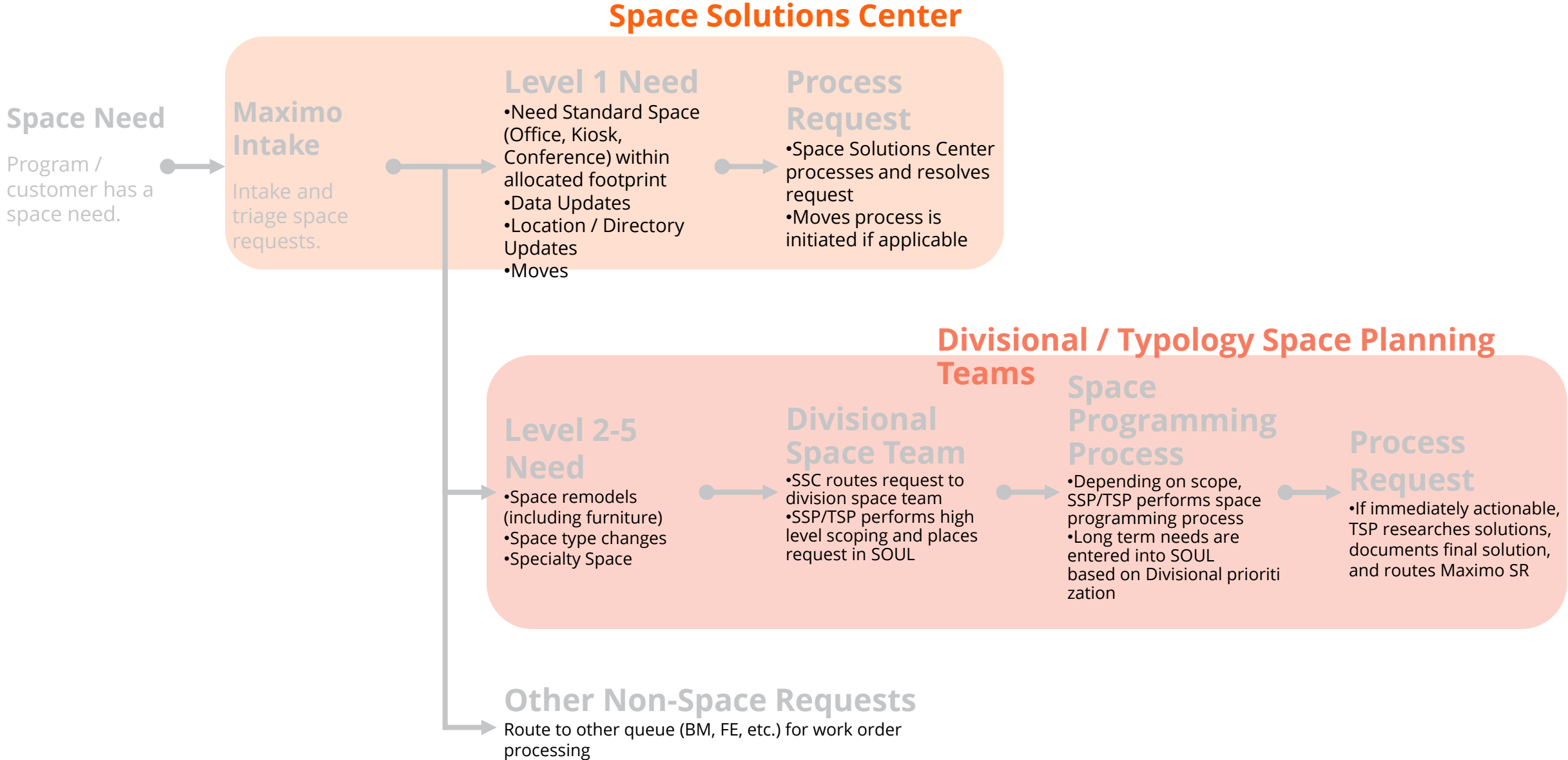
De-centralized strategic management is when all decisions are delegated throughout an organization with little or no integration across decisions.

Prior to 2018

Strategy: High Level Process

Space Solutions Center

Space Need

Program / customer has a space need.

Maximo Intake

Intake and triage space requests.

Level 1 Need
- Need Standard Space (Office, Kiosk, Conference) within allocated footprint
- Data Updates
- Location / Directory Updates
- Moves

Process Request
- Space Solutions Center processes and resolves request
- Moves process is initiated if applicable

Divisional / Typology Space Planning Teams

Level 2-5 Need
- Space remodels (including furniture)
- Space type changes
- Specialty Space

Divisional Space Team
- SSC routes request to division space team
- SSP/TSP performs high level scoping and places request in SOUL

Space Programming Process
- Depending on scope, SSP/TSP performs space programming process
- Long term needs are entered into SOUL based on Divisional prioritization

Process Request
- If immediately actionable, TSP researches solutions, documents final solution, and routes Maximo SR

Other Non-Space Requests

Route to other queue (BM, FE, etc.) for work order processing

Voice of the Customer: Requesters

Conduct and manage various business and operational roles.

There are varying degrees of involvement in space allocation and management among business professionals.

Involvement in space depends on:

- Unique needs (e.g., high security, labs, interns, telecommuting, staff spread out)
- Complexity (e.g., outside existing footprint)
- Urgency
- Leadership demands/expectations

Little to moderate involvement with space

- Space is handled by OAA or someone else
- If a DBA, space might be handled by CBA
- Center does not have a lot of movement or mostly remote workers
- Small center – space might be handled directly by director or managers

Highly involved with space

- First point of contact for space
- SSP/TSPs/Facilities are involved (albeit used at different parts of the process & to differing degrees)
- Tactical and strategic level involvement

"Working with numbers is much easier than working with space."

The majority of study participants spend 10-25% of their time working on space assignments and coordination.

0-1%   10-25%   45%   90%

VOICE OF CUSTOMER: EMPLOYEE

Category: Assign new Office (Need Space)

	1. Ticket Submitted	2. Verify	3. Process
Goal	Ticket is submitted with complete & accurate information.	Verify information related to request.	Process and approve request, and assign space.
What's Going Well?	• Requests asks for location • Good information if they use a template Good relationships being built • Single POC per center	• Can build positive relationship due to communications • Complete information helps the process move faster	• Check/balance with TSP approval (manual process) • Work log notes
What are the pain points?	• Incomplete / in-accurate information in ticket • Anyone can submit a request • Sometimes entered into wrong category causing delays • May have multiple MOW's (affected persons) on one ticket • Lack of requestor knowledge	• Time – too long in queue. Especially if new and not in EP or no start date • Lack of information creates more work • If space isn't vacant yet • Lack of or miscommunication • Multiple programs and databases	• If new and not in EP adds time • Dependent on requester doing upfront work / accurate information • Manual processes for work orders and moves • Requester missed information, can lead to data quality issues
Experience	😑	🙂 😑	🙂 😑

Ticket Resolved (Space Assigned) 🙂

VOICE OF CUSTOMER: EMPLOYEE

Category: Space Reconfiguration

	1. Ticket Submitted	2. Verify	3. Process	4. Re-Queue Ticket
Goal	Ticket is submitted with complete & accurate information.	Verify information related to request.	Process and approve request, and assign space.	Route ticket to appropriate queue for implementation.
What's Going Well?	• Initial information helps get the ticket started • User friendly and short	• Available databases • Space programming process • Building relationships • Walking space	• Work log notes	• Out of TSP queue!
What are the pain points?	• Inaccurate or not enough information included • Affected person not included – may be because requester doesn't want them notified • Requester or center doesn't know the correct process • Unauthorized requesters • Sometimes entered as mod/install instead	• Funding – unknown funding source or difficult to give accurate estimate • Vague information • Data quality, data may be inaccurate or missing in the system (network drops, building systems, etc.)	• Maximo won't timestamp comms in comm log • Comm logs may forward to incorrect building manager	• Scope doesn't involve space (entered as mod/install) • Customer contacts TSP for status even after re-routed
Experience	☹	☺ 😐	☺	☺

Ticket Routed for Implementation ☺

Structure for Efficiency

Level 1
Time*: within 1 week

Level 2
Time*: 1 week to 1 month

Occupancy Planning | Space Planning

Level 3
Time*: 1 to 2 months

Level 4
Time*: 3 – 5 months

Level 5
Time*: 6 – 8 months
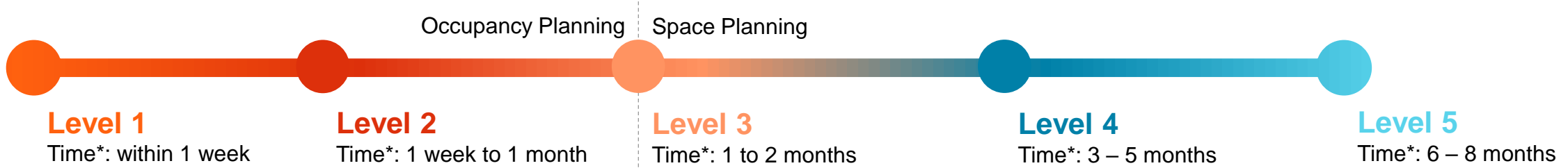
← Standard →

Office (existing, no mods)
- New Hire
- Transfer
- Interns (year round or summer)
- Moves and location updates

Lab (existing, no mods)
- Assign existing lab space

← Other / Non-Standard →

Data Updates
- Space classification
- Space utilization
- Change space type/tag

Other Process Involvement / Owner
- Remodels and modifications
- Change space type (office to lab, etc.)
- IT
- Building Systems (HVAC, Electrical, etc.)
- Security (badging, etc.)
- Furniture

Office (new)
- Non-existing office space
- Office mods

Relinquish Space:
- Return Space
- Demolish / Decommission space

← Specialty Space Types →

Reservable
- Kiosk
- Conference

Lab (new)
- Computer
- Electrical
- Chemical

Storage
- General / Corporate
- Battery / Equipment
- Transportainers
- High Security

High Security
- VTR
- SCIF
- SAP
- Compartmented Areas (CA)

Shop

*Time in TSP Queue / Space Owner Group

Structure: Integrative Decision Making

- Steps
  - Present the proposal
  - Clarifying Questions
  - Reactions
  - Amend and clarify
  - Objections (safety check)
  - Integration

- Results
  - Meetings with decisions
  - Inclusive where all participants opinions are heard
  - Faster decisions – not stuck in discussion
  - Proposals will get better with practice

Get quick buy in

SOLUTION

ISS Manager

Matrixed Support (TSP/Coordinator)

Space Program Support

Space Solutions Center	TSP	TSP	TSP
ND Team	SSP	SSP	TSP
1k / 10k Team	SSP	TSP	TSP
3k / 6k / 11k Team	SSP	TSP	TSP
4k / 5k Team	SSP	TSP	TSP
8k / 9k Team	SSP	TSP	TSP
Coordinators	Coordinator	Coordinator	Coordinator

ISS Support

- Admin Support
- TSP Operations Lead
- Project Manager
- Data Quality Assurance
- Data Analyst

Specialty Space Support

| High Security SSP | TSP |
| Lab SSP |
| Storage SSP |
| Kiosk/Conference SSP |
| Bridging SSP |
| Utility SSP |

How it relates to PMI chapters. . . .

Sandia National Labs	PMI Chapter

• Team structure strategy
   • What did we want to accomplish
• Voice of the Customer
   • What were they saying?
   • What were the employees saying?
• How to Structure for efficiency
   • Process Improvement
   • Journey Map
   • Integrated Decision Making
• Space Solution Center & Divisional Teams
	• What is your Chapter Strategy?
	   • What do you need? What is the problem?
	• What it like to be a member of your Chapter?
	   • Is that matching what you are providing?
	• What do members what?
	   • Do they want in person?
	   • Do they want networking? Training?
	• Who are your members? Are you getting the people you want?

Activity: Q Storming – A New Brainstorming

At your table. . . Take the next 4 mins to write down EVERY idea you have for:

Increase Membership	Get Members Involved in the Chapter	Team Activities/Training

Image found on internet here

Activity: Q Storming – A New Brainstorming

At your table. . . Take the next 5 mins to talk about your best ideas:

Increase Membership	Get Members Involved in the Chapter	Team Activities/Training

Share your best idea with the table – round robin

Have paper and pen handy!

WHY

Dream chapters are sculptured – you create them little by little

FY23 in review

People

Purpose

Connection

Ops Lead

Your Chapter: Your People

- They want to be included

- They are why you are there

- Make it easy for them to participate at their level

- RELATIONSHIPS
  - With PMI
  - With the Chapter
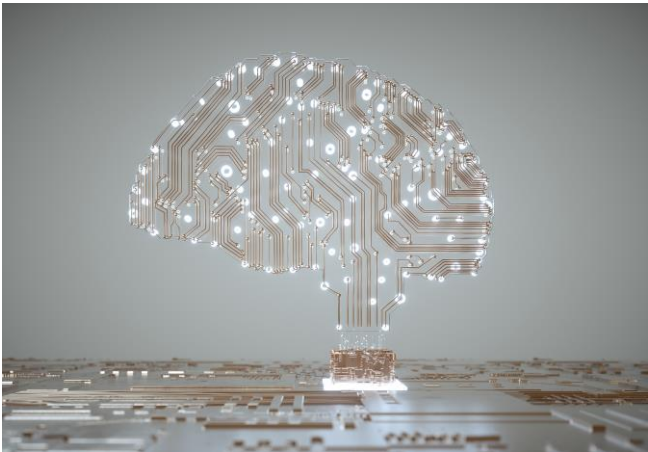 - With each other
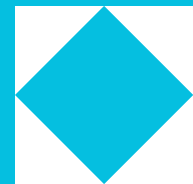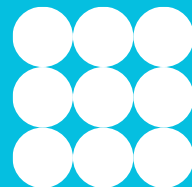
Purpose of the Chapters

Support

Networking

Training

Innovation

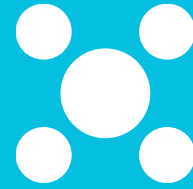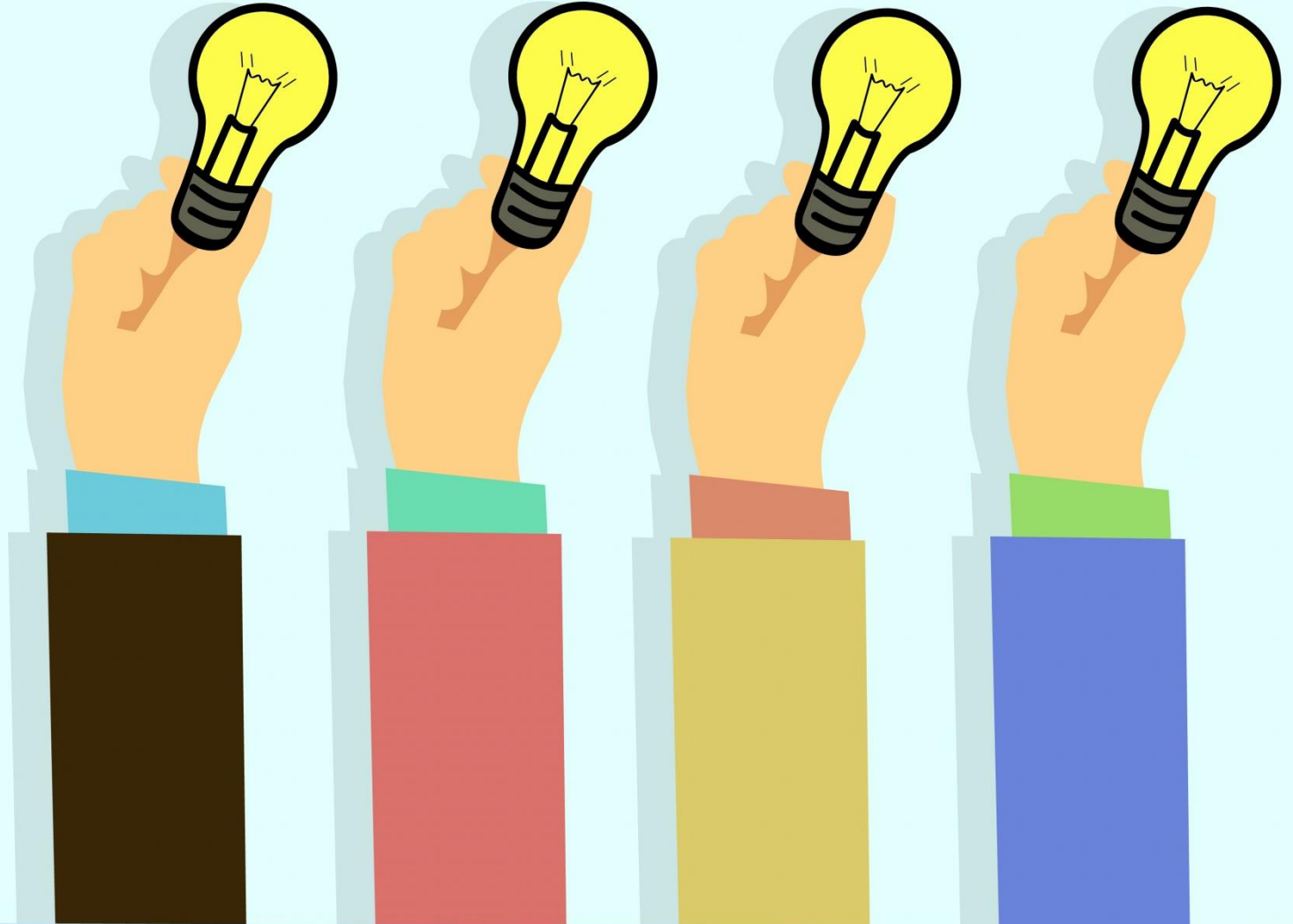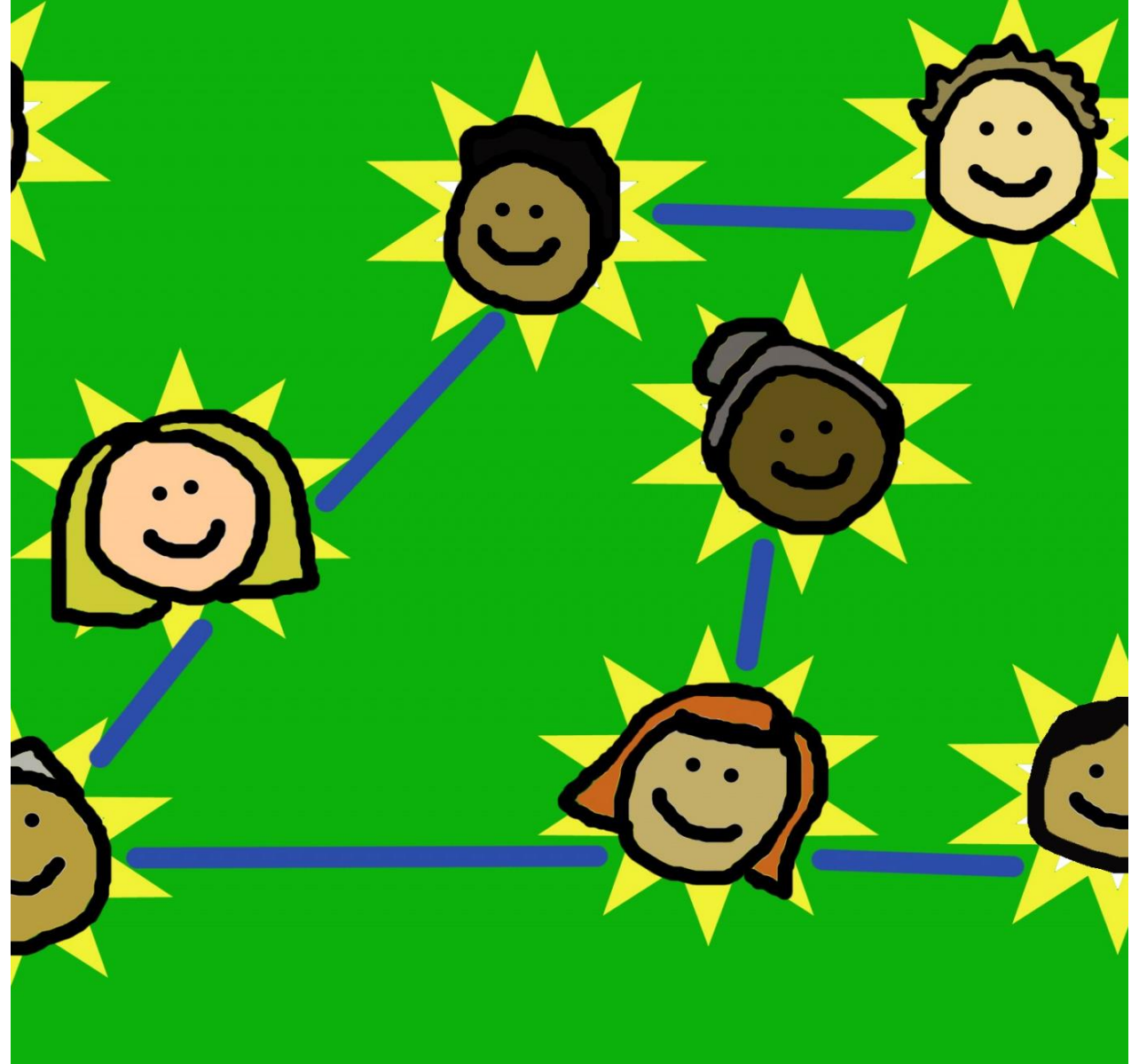# SOME IDEAS
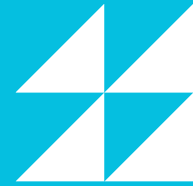
Not all ideas will work for all chapters

Some might not be new

Use it to inspire you
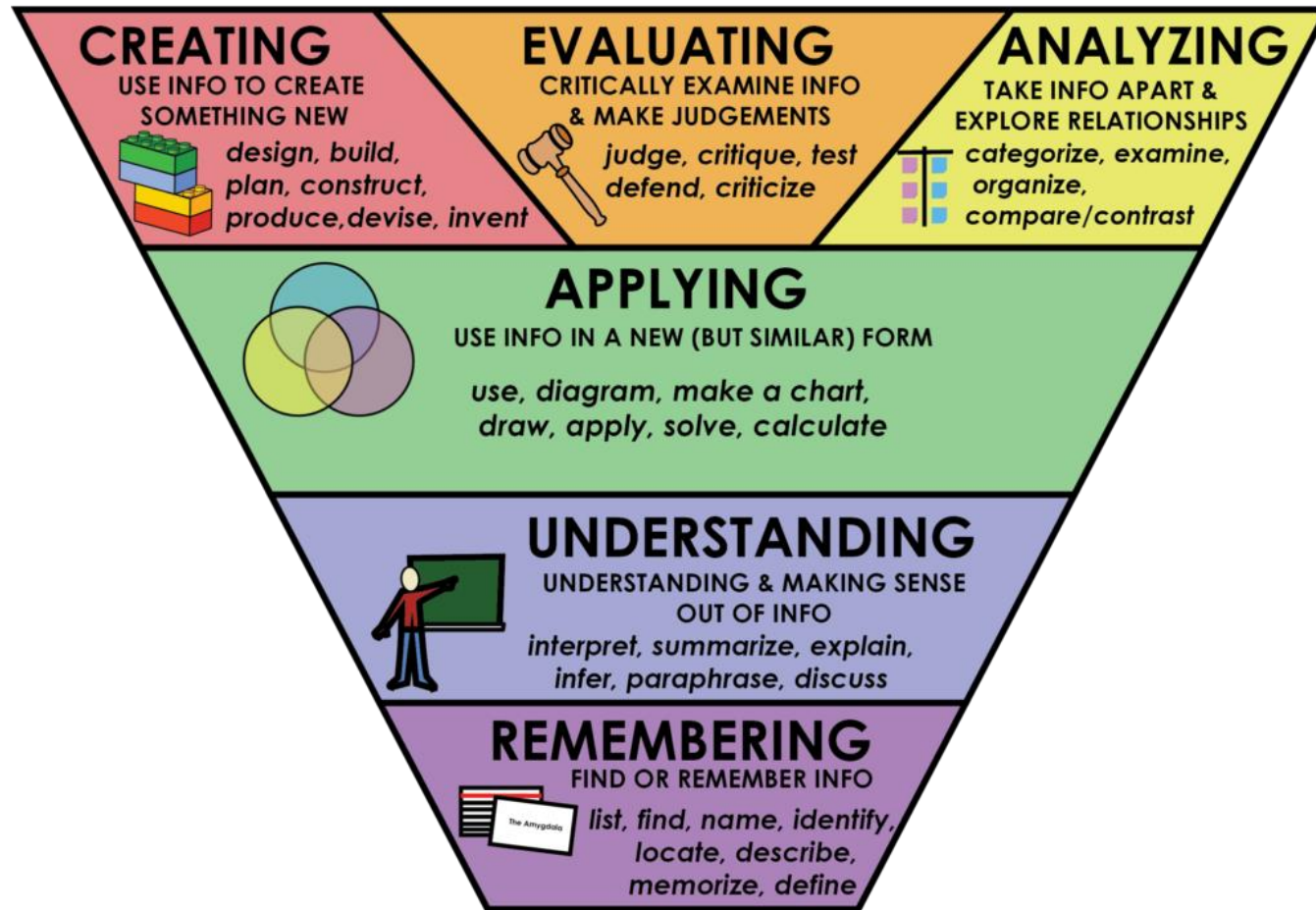
Relationship Building

- Ice Breakers in meetings
  - Person bingo, table switches, introduce a table mate
- Quarterly networking meetings
- Mentors – groups of people to meet
- Meet a professional forum
- Membership list
- Quarterly Advisor Group to the Board
  - Include Millennials and Gen Z

Understand Current State

BLOOM'S TAXONOMY

CREATING
USE INFO TO CREATE SOMETHING NEW
design, build, plan, construct, produce, devise, invent

EVALUATING
CRITICALLY EXAMINE INFO & MAKE JUDGEMENTS
judge, critique, test defend, criticize

ANALYZING
TAKE INFO APART & EXPLORE RELATIONSHIPS
categorize, examine, organize, compare/contrast

APPLYING
USE INFO IN A NEW (BUT SIMILAR) FORM
use, diagram, make a chart, draw, apply, solve, calculate

UNDERSTANDING
UNDERSTANDING & MAKING SENSE OUT OF INFO
interpret, summarize, explain, infer, paraphrase, discuss

REMEMBERING
FIND OR REMEMBER INFO
list, find, name, identify, locate, describe, memorize, define

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- Survey for interests/pain points

- What is the member wanting training on?

- Journey Mapping – the experience as a new person

- Do a follow up survey – check your results

Activity

Stand up. . . .

New Members

- Create New member onboarding
- Assign a "mentor" to do a monthly check in (email or phone)
- Give a checklist for a new member to fill out
  - Meet one of the speakers
  - Attend one lunch/learn
  - Make a new acquaintance at event

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Education/Training

- Spotlight a PMI training/resource
  - AI, soft skills, webinars
- PMP Prep - mentor buddy
- Create an on demand library of local PMs talking about specific skills in small 10 min bit

Resources/Marketing

- Monthly emails –highlight not just events but links to
  - PMI webinars
  - PMI resources
  - PMI Training
- Create a FAST Five – give some tips, resources, info, links to podcasts (leadership and project management)

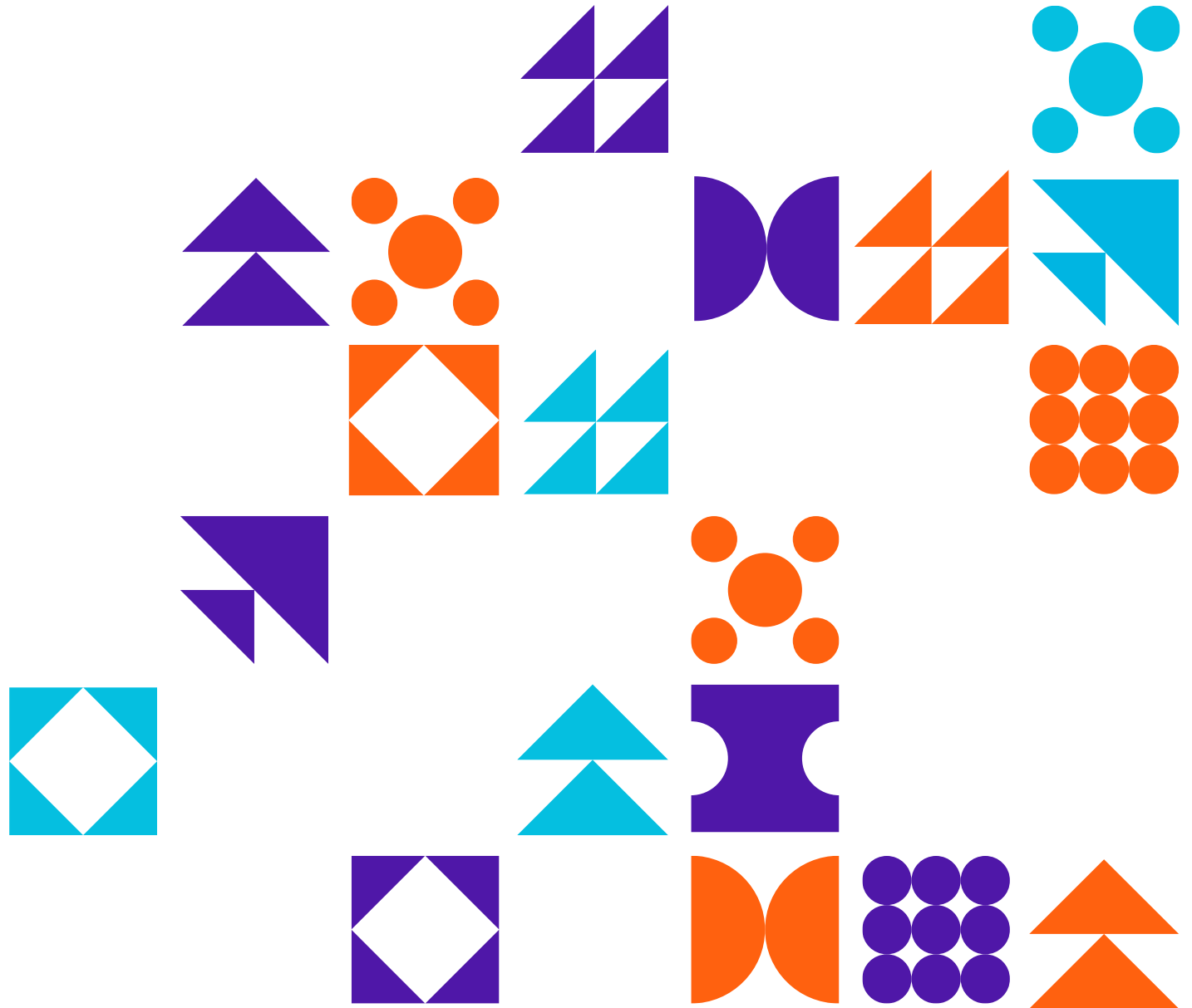This Photo by Unknown Author is licensed under CC BY-NC-ND

Misc.

- Make Membership Thank you calls
- Consider a volunteer core under your Board positions
- Student outreach at local college and community colleges
- Ask a specific member to talk on a specific topic – they love to be asked

BRING IT ALL
TOGETHER:

PEOPLE

IDEAS

OPPORTUNITIES

People

Know your members

Know your strategy

Know your why

Ideas

What was the idea you came up with the activity?

What about others ideas?

Did one of mine or a table mate's inspire you?

Opportunities

What is happening now you can take advantage of?

What are you going to do next?

Which tool are you going to use – survey, journey map, integrative decision making, Q-storming, brainstorming, etc.

THANK YOU!

How to obtain PDUs for this session:

1. Scan this QR code to the Mentimeter Survey

2. Enter Your Name

3. Complete the Presentation Evaluation

If you are having issues with scanning the QR code, then either use the URL listed below or see the session facilitator or registration desk for assistance.

URL: https://bit.ly/44EBDOk

Project Management Institute. Rio Grande