# TIMELINES

What Are They and How Can They Be Used for WorldCons?

#### Introduction

- Who am I and what gives me the right to be here in front of you?
  - Not a professional project manager
  - No formal training in project management
  - Working/Volunteering at all types of SF conventions in all levels of responsibility since 1976
  - Independent meeting planner for 20+ years
  - Certified Meeting Professional

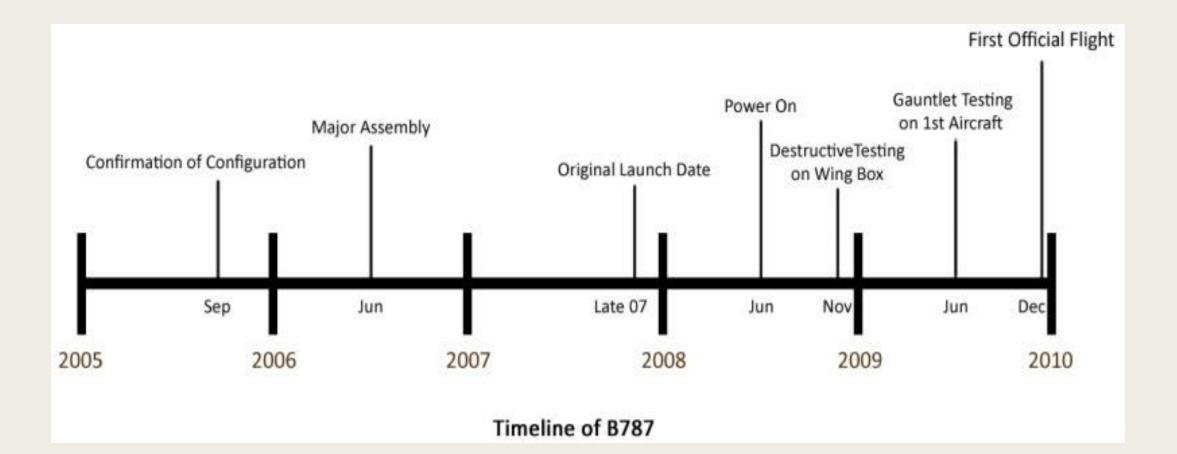
#### **Stakeholders**

- Defined as "a person with an interest or concern in something, especially a business."
- This session has at least three stakeholders looking to get something out of it
  - The convention tie into con's theme and talk about software
  - The presenter review timeline project and get feedback
  - The audience ?????

## What is a timeline?

- Wikipedia says "A timeline is a way of displaying a list of events in chronological order, sometimes described as a project artifact".
- Collection of dates and tasks that make up a project
- A collection and display of a project's time-related data
- Project timelines outline the major deliverables of a project in a chronological sequence.

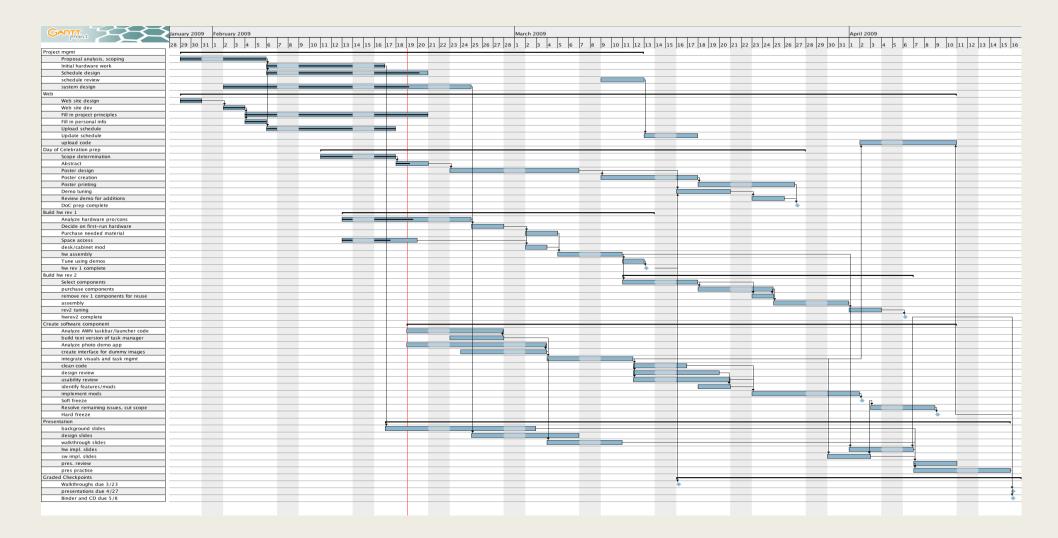
#### **Historical Timeline**



#### Simple Excel-based Timeline

File		nsert Page Layout Formulas [	Data Revie	ew Vie	ew Develo	oper Add-ins	Team 🖓 Te	ell me what you want	10 40						14		2									
	🔏 Cut	Calibri 11 A A	= =	- *	- 🔫 W	/rap Text	Custom		4				-	• 📑	×		Σ Aι		n •	A77	$\mathcal{O}$	)				
	Copy 🔹							Com	tienel.		<b>.</b>						🕹 Fi	ill -		ort &	Final	o.				
e	🝼 Format Painte	B I U · · · · · A ·		•	→ M	erge & Center 🔹	\$ - % 9		itional atting *			Styles -	Inser	rt Dele	ete PC	rmat	C	lear -		ilter *						
			_									Styles		*							Jeleci					
	Clipboard	Fa Font Fa		A	lignment	5	Numbe	r G		Styles				Cel	ls				Editin	9						
	- · ·	$\times \checkmark f_x$																								
3		J.																								
	A	В	С	D	E	F	G	Н	I J	K L	M N	O P	QR				Z AA	AB AC	AD AE	AF AG	AH AI	AJ AK A	AL AM/			≀AR A
	MR Number	Task Name	Duration	Status	Expected	Expected	Actual Start	Actual							May-1		_							Jun		
			Daration	oluluo		Completion Date	Date	Completion Date	4 5	6 7	8 9	10 11	12 13 1	14 15 16	5 17 18	3 19 20	21 22	23 24	25 26	27 28	29 30	31 1 2	! 3 /	4 5	6 7	8 9
	02.120.004	Coating	1 days		Sat-20-May	Sat-20-May																		+		$\vdash$
		Filling ballast	1 days		Sat-20-May	Sat-20-May			_					-						_				+		
		#2Pwbt -40m2 (underballast condition)	9 days		Sun-14-May	Mon-22-May			_													$\rightarrow$		+		++
		Staging erection	2 days		Sun-14-May	Mon-15-May			_											_	_	$\rightarrow$		$\rightarrow$		++
	02.120.005	Powertooling / Steel repairs on LR list Coating	5 days		Mon-15-May	Fri-19-May																				++
	02.120.005	Destage & cleaning	2 days		Sat-20-May	Sun-21-May					+ + -				+ +							++		+		++
		Filling ballast	1 days 1 days		Mon-22-May Mon-22-May	Mon-22-May Mon-22-May																++			<u> </u>	
		#2Swbt -35m2 (underballast condition)	9 days		Sun-14-May	Mon-22-May																+++			<u> </u>	+++
		Staging erection	2 days		Sun-14-May	Mon-15-May																++			-	++
		Powertooling / vent pipe and steel repairs	5 days		Mon-15-May	Fri-19-May					++											+++			<u> </u>	++
	02.120.006	Coating	2 days		Sat-20-May	Sun-21-May																				
		Destage & cleaning	1 days		Mon-22-May	Mon-22-May																				$\square$
		Filling ballast	1 days		Mon-22-May	Mon-22-May																				$\square$
		#3 Pwbt - 20m2	18 days		Wed-10-May	Sat-27-May																				
		Staging erection	2 days		Wed-10-May	Thu-11-May																				
	03.120.003	Steelwork - 1# 2nd deck plate and vent pipes	5 days		Wed-17-May	Sun-21-May																				
		Powertooling	6 days		Fri-12-May	Wed-24-May																				
	02.120.007	Coating	3 days		Wed-24-May	Fri-26-May																			$\square$	
		Destage & cleaning	1 days		Sat-27-May	Sat-27-May																			$\vdash$	
		#3 Swbt - 25m2	18 days		Thu-11-May	Sun-28-May																$\rightarrow$			$\vdash$	$\square$
		Staging erection	2 days		Thu-11-May	Fri-12-May																			$\vdash$	$\square$
	03.120.004	Steelwork - 1# 2nd deck plate maholes areas	4 days		Thu-18-May	Sun-21-May																			<u> </u>	$\vdash$
		Powertooling	2 days		Mon-22-May	Tue-23-May																++	++	+	<u> </u>	++
	02.120.008	Coating	3 days		Wed-24-May	Fri-26-May																++	++	+		++
		Destage & cleaning #4Pwbt -3m2	2 days		Sat-27-May	Sun-28-May																++	++	+	$\vdash$	++
			12 days		Tue-16-May	Sat-27-May																++	++	+	$\vdash$	++
		Staging erection Steel repairs on the lightening holes	1 days		Tue-16-May	Tue-16-May																++	++	+	$\vdash$	++
		orear repairs on the lightening holes	4 days		Wed-17-May	Sat-20-May																			$\rightarrow$	+

#### **Classic Gantt Chart with Dependencies**



# Why use a timeline?

- While it is possible to drive from East to West Coast without a map, it is infinitely easier, faster, and less stressful with one.
  - Gives an overview of what the project will accomplish and how it will be done.
  - Clearly communicates important milestones and tasks
  - Helps team to recognize of the value of time in a project
  - Helps avoid foreseeable legal and financial emergencies

# WORLDCON TIMELINE PROJECT

#### **Timelines & Worldcons**

- Not your daddy's convention any more; increased financial exposure requires improved business practices
- Worldcon's have been using a standard budget template and philosophy for several years
- Need to develop something similar for timelines
- Bringing current the Smofcon sanctioned timeline template developed by Elaine Brennan & her team over a decade ago

## The WorldCon Timeline Project

- FLEXIBILITY adaptable to each Worldcon committee's unique structure & goals.
- SIMPLICITY streamlined enough to hold a volunteer's attention and not scare them away with a torrent of information; useful information is not buried in detail
- CLARITY well-defined/distinct/clear-cut and understandable presentation of useful information

# **Adjusting the Approach**

- Began with WC76 (San Jose) using the Brennan/Smofcon template as a starting point.
  - Adjustment #1 Worldcon planning phases not defined by the months out from the con, but mostly by the intervals between Worldcons and Smofcon.
  - Adjustment #2 Worldcons are \*very\* complex projects and anything other than high-level milestones & deadlines would soon overwhelm useful information.

# Adjustment #1 - Phases

PHASE 1 – BIDDING	• Beginning of Bid to the vote
PHASE 2 – TRANSITION	<ul> <li>Vote through Smofcon1 (end of year)</li> </ul>
PHASE 3 – PLAN (& PLOT)	• First of the year (Smofcon1) through Worldcon1
PHASE 4 – DEVELOP	<ul> <li>Worldcon1 through Smofcon2 (end of year)</li> </ul>
PHASE 5 – IMPLEMENT	• First of the year (Smofcon2) through 3-months out
PHASE 6 – PREPARE for MOVE-IN	• 3-months out through the day before the con
PHASE 7 – WORLDCON	Convention dates
PHASE 8 – CLOSURE	<ul> <li>Post-convention until books closed &amp; all monies disbursed</li> </ul>

# Adjustment #2 – Critical Info Only

**PROBLEM:** TMI – text too dense to find specific data.

SOLUTION: Separate <u>internal</u> from <u>inter-</u> <u>divisional</u> projects & tasks in effect creating 2 timelines

## **CRITICAL INFO - Vendor Commitments**

Contractual deadlines with outside entities

- Deposits or other payments due to the convention center or hotel(s)
- Catering orders due to the caterer or catering department
- Room reservation cut-off date & block review

# **CRITICAL INFO – Mandated Deadlines**

Legal, governmental, and other external regulatory deadlines

- WSFS comes to mind
- National/Federal, State, and local tax or corporate filing deadlines
- Member registration deadline for Hugo voting eligibility

#### **CRITICAL INFO - Inter-Divisional Deadlines**

Deadlines affecting more than one division or the committee-as-a-whole

- Submission deadlines for convention publications such as progress reports and the souvenir book
- Anticipated membership rate hike dates
- Publicity/press release of event announcements

# **CRITICAL INFO - Other Important Dates**

Events that the committee-as-a-whole should be aware of

- Dates of Committee meetings, whether on-line or in-person
- Dates of important conventions like Smofcon, and the seated Worldcons, and others that may be important to the group
- DH requested review points

# **Scope of Timeline Project**

- Gather, maintain, & present the critical dates in a convention's planning process
- NOT "classic" project management Working with "high level data" i.e. deadlines & milestones only
- NO resource management, dependencies (at least not at the moment), critical paths, etc.
- Most of all, no nagging. This is an informational only tool to assist DH's in keeping their divisions on track. No email reminders advising people they're behind on their project.

#### **Updating Process**

Verbally review Significant Dates List at DH Meeting Prepare & post new Timelines & Significant Dates List on wiki

Send Google Sheets version of divisional timelines to each DH

Process updates to divisionals as received from divisions

Rinse and repeat

# SOFTWARE

# It's a Jungle Out There

There are hundreds of applications that can help manage a project or keep a timeline

- Heavyweights such as MS Project designed for large projects
- Moderate PM/timeline software targeting mid-sized companies & projects
- Basic approaches use common spreadsheets and a variety of templates
- Many group collaboration applications also include PM/timeline features
- Vast majority are cloud based and many are cross-platform capable
- Almost all of them cost money, although a few offer free limited access

#### What to Choose?

Depends on what you want to do; what info to be collected and how it should be stored and presented

- For the Worldcon Timeline Project, the original 3 criteria apply to software selection as well
  - **FLEXIBLE** in order to adapt to new groups & approaches
  - **SIMPLE** to use
  - **CLEAR** data presentation with multiple types of report formats
- NOT needed were most of the standard PM tools and features including group collaboration

#### **Current Adaptation**

Worldcon Timeline Project currently using a combination of software

- SmartSheet for data storage and manipulation as well as some reporting
- Goggle Sheets for the divisional timelines including tracking changes made by DH's
- Google Drive to store and make reports accessible

Always looking for better options!