Managing a Library Project

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Introductions

Who are you?

- Name
- Job title & Library
- 2 sentences about your project

Workshop Structure

"Talk, do, discuss" approach

1. Recap: what is PM
2. Project proposal, project charter
3. Communications plan
4. Project plan
5. Project execution

Activity 1

After Action Review

1. What was supposed to happen?
2. What actually happened?
3. Why were there differences?
   What did we learn?

Activity 1

After Action Review

Something you did:

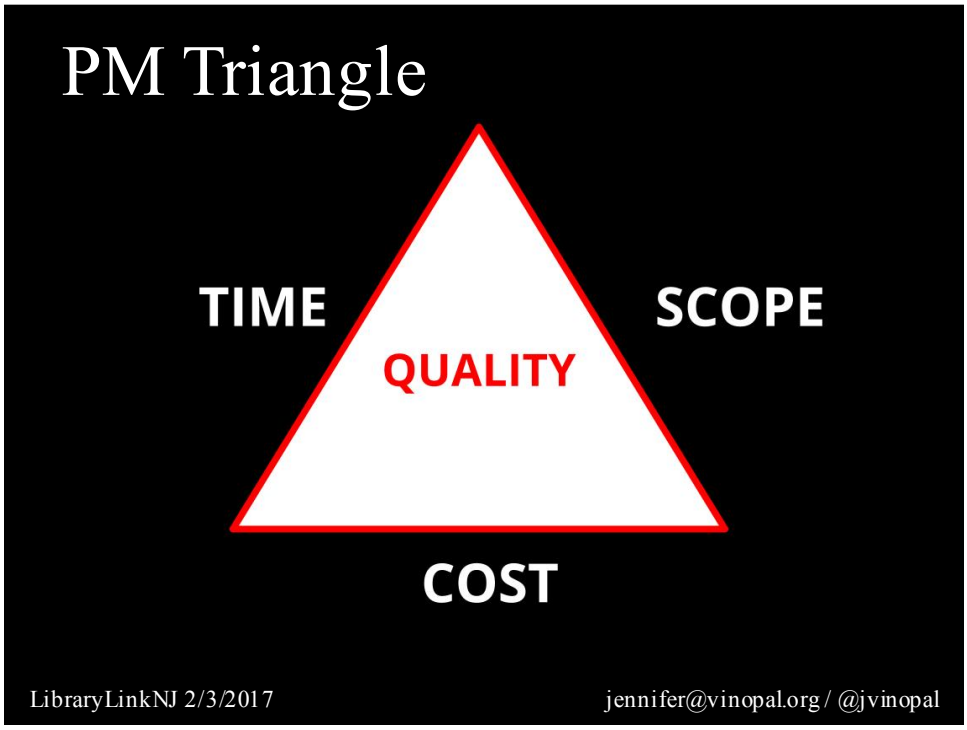
1. What went right/wrong?
2. Why did it happen?
3. What to do same/differently next time?

Activity 1: Discussion

What is Project Management?

What is a Project?

1. limited duration — TIME
2. defined beginning and end
3. using resources — COST
4. specific objective — SCOPE


PM Triangle
TIME
SCOPE
QUALITY
COST
LibraryLinkNJ 2/3/2017
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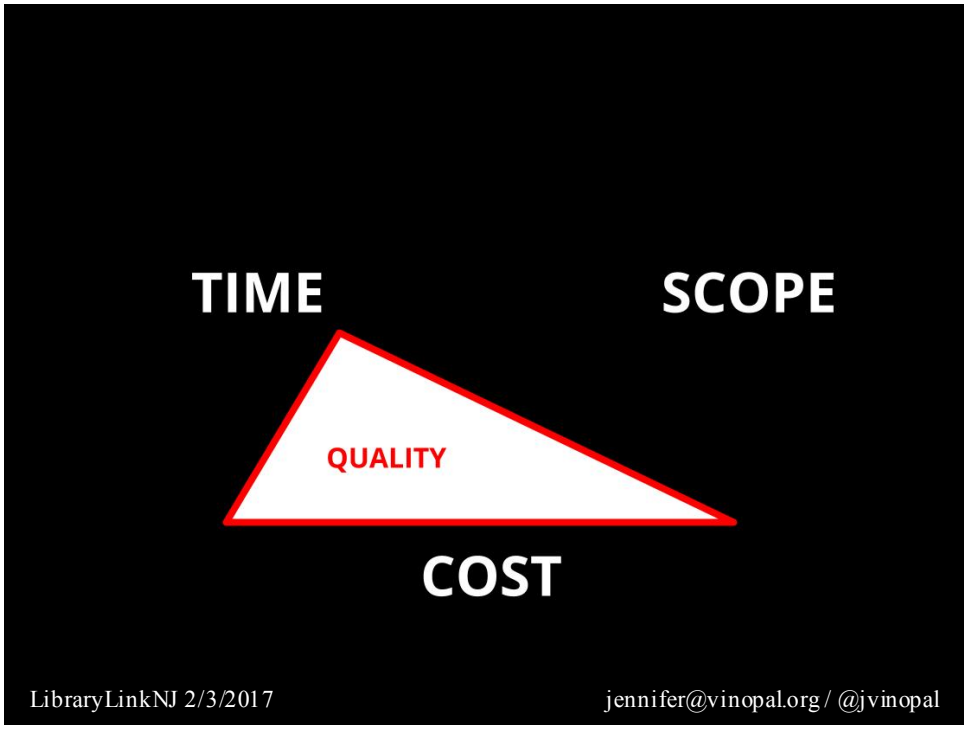
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PM Triangle

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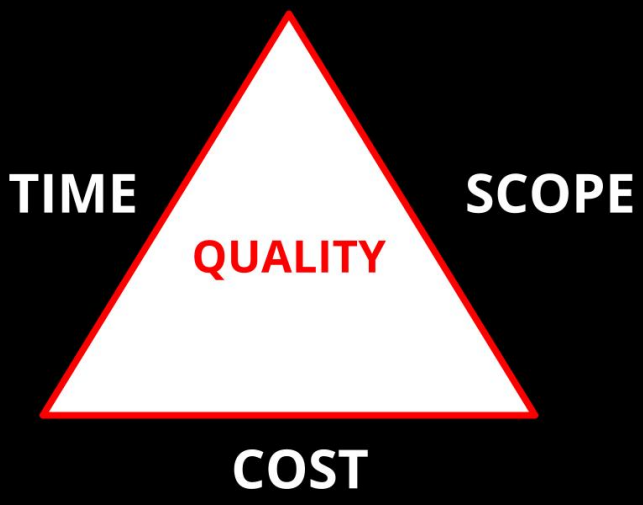

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What is Project Management?

1. organized
2. overseen
3. administered

PLANNING

MONITORING & CONTROL

How do you do that?

- define scope
- plan (resources, time, $)
- facilitate & communicate
- monitor execution & scope (~~creep~~)
- escalate when necessary
- change management

The Project Proposal

The Project Proposal

1. Rhetorical device. Goal=convince
2. Not always required
3. Format & content depends on target audience
4. Formal or informal
5. Written or oral

The Project Proposal

Challenges?

Activity 2

Swap project proposals with partner.

Imagine you're the target audience.

Ask some questions and make some suggestions to make the proposal stronger.

Activity 2: Discussion

Break?

The Project Charter

Why Projects Fail – Sierra

1. Goals of project are unclear
2. Disagreement about the goals
3. Requirements are ambiguous or unrealistic
4. Project is inadequately staffed

Why Projects Fail – Sierra

5. Lack of consensus on roles
6. Proposed schedule is unrealistic
7. Scope is poorly managed or unconstrained
8. Project just doesn't make sense

Project charter

1. Project name
2. Description
3. Deliverables (in/out of scope)
4. Project team
5. Milestones/Schedule

Business Case — Siemens

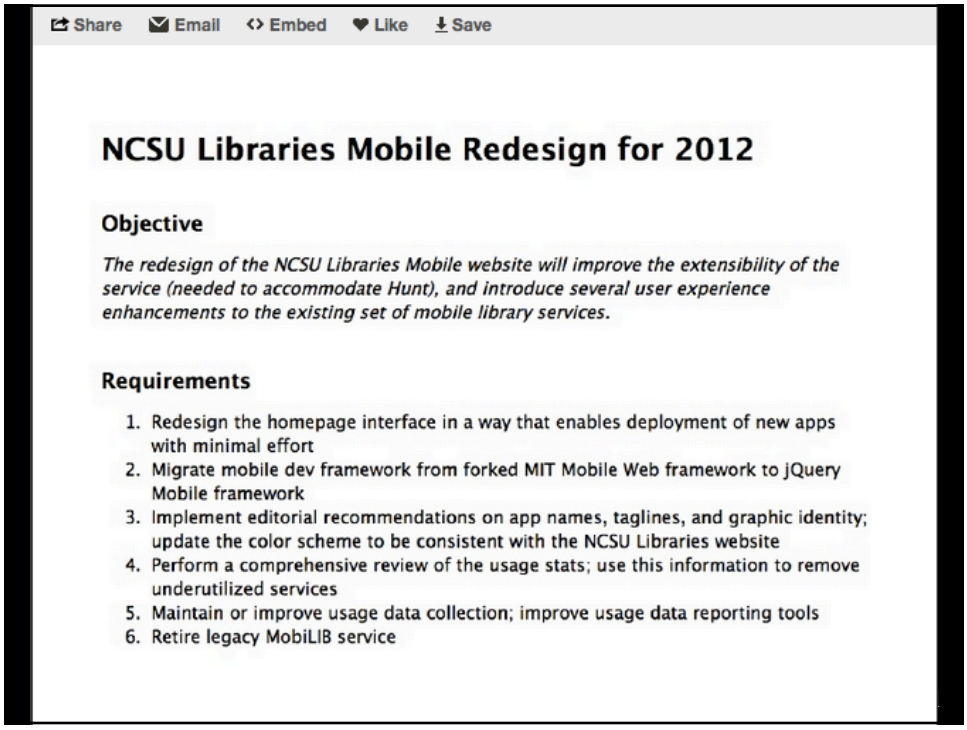
- Why do this project?
- What happens if we don't do it?
- Why do it now?
- How critical will the impact of the project be?
- What could go wrong?
- Countermeasures?

How good is my charter?

- Are description/success criteria clear and complete?
- Have I listed non-deliverables?
- Have I included key dates?
- What information am I missing?
- Where can I get missing info?

How good is my charter?

- Has it helped me build consensus re. what the project is about?
- Have all key stakeholders helped?
- Are there differences of opinion?
- Where was there significant disagreement? (Keep your eye on)



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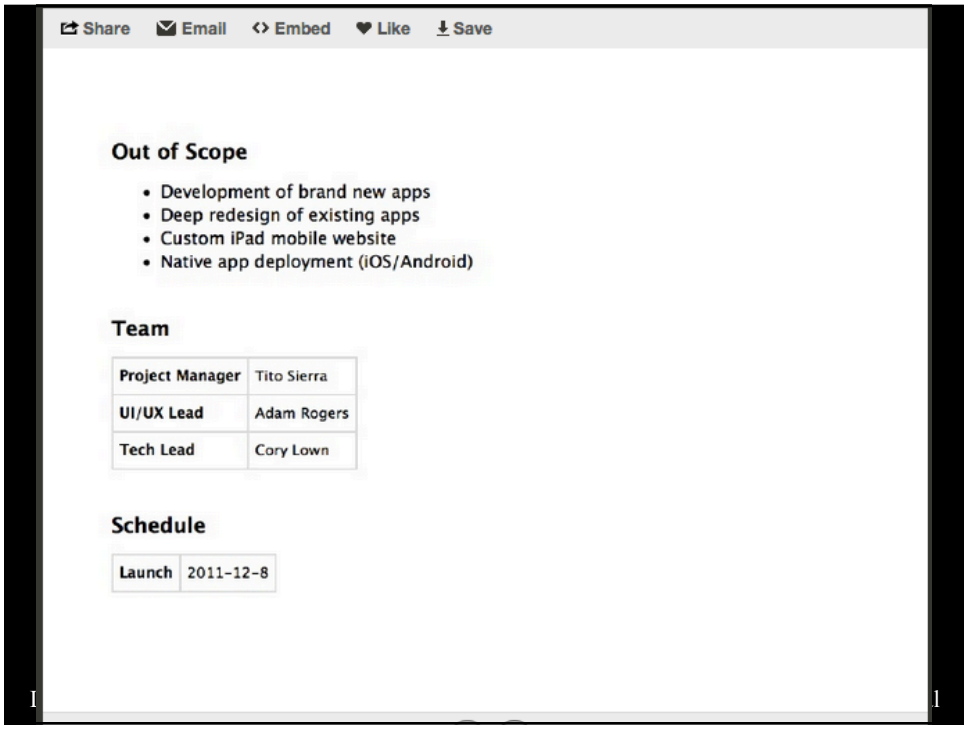
NCSU Libraries Mobile Redesign for 2012

Objective

The redesign of the NCSU Libraries Mobile website will improve the extensibility of the service (needed to accommodate Hunt), and introduce several user experience enhancements to the existing set of mobile library services.

Requirements

1. Redesign the homepage interface in a way that enables deployment of new apps with minimal effort
2. Migrate mobile dev framework from forked MIT Mobile Web framework to jQuery Mobile framework
3. Implement editorial recommendations on app names, taglines, and graphic identity; update the color scheme to be consistent with the NCSU Libraries website
4. Perform a comprehensive review of the usage stats; use this information to remove underutilized services
5. Maintain or improve usage data collection; improve usage data reporting tools
6. Retire legacy MobiLIB service



How good is my charter?

- Can someone reading this be absolutely sure what this project *IS* and *IS NOT* about?

If not, you're in trouble. So let's fix it.

A note about agile

- Not incompatible with charter
- Define/agree what success looks like
- Agile charter:
  vision, mission, success criteria

Agile charter

"includes at least the major objectives of the project, scope boundaries, and reciprocal agreements between the project's implementation team and external stakeholders."

-- Agile Alliance,
https://www.agilealliance.org/glossary/project-chartering/

Agile charter

"results in greater alignment of effort within the team, which is often a key determinant of project outcomes."

-- Agile Alliance,
https://www.agilealliance.org/glossary/project-chartering/

Your Choice

- Start your project charter
- Start a communications plan
- Start a project plan

Suggestion: save charter for later, if we have time.

Activity 3

Write a draft project charter

- project partners work together
- then swap with another team & critique

Activity 3: Discussion

The Project Plan

Basic Plan Includes

- Charter
- Schedule (different for agile)
- Time estimates (different for agile)
- Communication plan
- Risk and change plans

Communication Plan

- Goals
- Roles
- Types: share info, get feedback, make decision, etc.
- Tools & Methods

Communication Plan

- Stakeholder
- Message
- Communicator
- Schedule
- Delivery Method
- Status + Comments

Activity 4: Communication Plan

- Stakeholder
- Message
- Communicator
- Schedule
- Delivery Method

Activity 4: Discussion

Lunch?

The Project Schedule

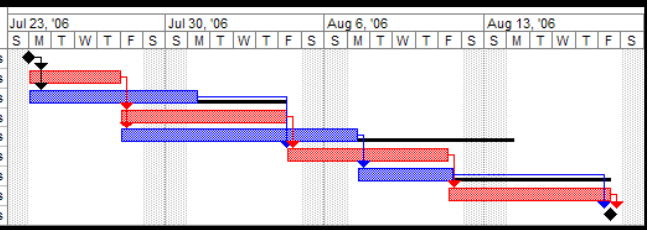
- Tasks & Subtasks (deliverables)
- Responsible person
- Dependencies
- Due by
- Resolution Notes
- Status

Example Project Plan

	Task	Subtasks	Respon	Depen	Start	End	Status
1	Hire subject specialist cataloger	Create job description for subject specialist cataloger	JV	0	10/5/2011	10/10/2011	COMPLETE
		Approval for job description	MS	0	10/10/2011	10/15/2011	COMPLETE
		Post job ad	HR	0	10/15/2011	10/18/2011	COMPLETE
		Interview and hire cataloger	JV	0	10/18/2011	11/10/2011	PENDING
2	Determine publishing and access requirements & restrictions.	Talk to collection owner: Dedicated website or repository? Share this collection with world or NYU only? Are there rights issues (no permission forms)?	JV	0	10/5/2011	10/30/2011	DELAYED
3	Identify special collection owner of the digital collection	Talk to 3 special collections and determine proper home for digital collection (may depend on access restrictions)	JV	2	11/1/2011	1/1/2012	DELAYED
		Communication with University Archives	JV	2	11/1/2011	1/1/2012	DELAYED
		Communication with Fales	JV	2	11/1/2011	1/1/2012	DELAYED
		Communication with Tam-Wag	JV	2	11/1/2011	1/1/2012	DELAYED
4	Set up collection & cataloging environment in DSpace	Determine cataloging requirements with scholar	MM (DSpace service owner)	0	10/5/2011	10/31/2011	IN PROCESS
		Work with DSpace programmer to set up collection	MM	0	10/5/2011	10/31/2011	IN PROCESS
		Ingest project files into DSpace collection	programme	0	10/5/2011	10/31/2011	IN PROCESS
5	Train Cataloger	Introduction to DSpace & project-specific cataloging	MM, w/JV	1, 4	11/15/2011	11/20/2011	PLANNING
		Create test catalog records and QA with scholar	cataloger		11/20/2011	11/30/2011	PLANNING
6	Catalog project materials	Create a record for each item in the collection	cataloger	5	12/1/2011	1/15/2012	PENDING

Example Gantt, Critical Path

ID	Task Name	Predecessors	Duration
1	Start		0 days
2	a	1	4 days
3	b	1	5.33 days
4	c	2	5.17 days
5	d	2	6.33 days
6	e	3,4	5.17 days
7	f	5	4.5 days
8	g	6	5.17 days
9	Finish	7,8	0 days



Creating the Task List

Estimating Task Time

Activity 5: Start Task List

- Small post-its
- 1 task per post-it
- Distinguish betw tasks & subtasks
- Can include time estimates
- With your project partner
- ~20 minutes

Activity 5: Create Project Plan

- Small post-its onto large post-its
- Note dependencies (markers)
- With your project partner
- ~20 minutes

Activity 5: Discussion

Break?

PM Tools

Project Execution

https://www.flickr.com/photos/800430/13511009564/sizes/o/

Monitoring

https://www.flickr.com/photos/emmandevin/8672736002/sizes/l

When things go wrong

http://www.flickr.com/photos/buymelunch/7925196254/sizes/z/

Beginning, Middle, End

- After Action Review
  - What worked?
  - What didn't?
  - How to do it better next time?
- Document your learning

Closing the Project

Celebrate!

Final Questions?
Thoughts?
Advice?

Thank you!

Credits

- Agile Alliance. https://www.agilealliance.org/glossary/project-chartering/
- Khanna, Delphine. "Humanities & Technology: Lightweight Project Management." presented at the THATCamp Philadelphia, Philadelphia, PA, September 23, 2011. http://philly2011.thatcamp.org/files/2012/06/khanna_pm.pptx
- Salo, Dorothea. "Project Management." February 18, 2013. http://www.slideshare.net/cavlec/project-management-16606291
- Siemens, Lynne. Various project management resources. December, 2013.
- Tito Sierra. "The Project One-Pager: A Simple Tool for Collaboratively Defining Project Scope" Technology, October 30, 2011. http://www.slideshare.net/tsierra/the-projectonepager
- Starr, Joan. "Project Management in a Box." Technology, May 11, 2011. http://www.slideshare.net/joanstarr/project-management-in-a-box

Other Resources

- "Crowdsourced Library Project Management Toolkit," n.d. https://docs.google.com/document/d/1aCZaScfh1VsvkOH4ksZDh6exzAH7n8_mMrpnw4yINcI/edit?usp=sharing
- Digital Library Federation Project Managers Group listserv: DLF-PM-GROUP@LISTS.CLIR.ORG
- Vinopal, Jennifer. "Project Portfolio Management for Academic Libraries: A Gentle Introduction." College & Research Libraries 73, no. 4 (July 2012): 379–389. http://hdl.handle.net/2451/31581

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Extra content: PPM

Portfolio Management

Why Portfolio Management?

- project overload
- alignment with vision/goals
- manage risk
- assess performance & problems
- correct course

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What is PPM?

- comprehensive inventory
- ongoing *process*
- regular review, strategic vision
- governance, decision making
- guessing → knowing

What do you track?

Project name
Start/end dates
Brief description
Project manager
Status
Priority
Notes

What else can you track?

- Alignment with strategic plan
- Sponsors
- Key stakeholders
- Funders
- Partners

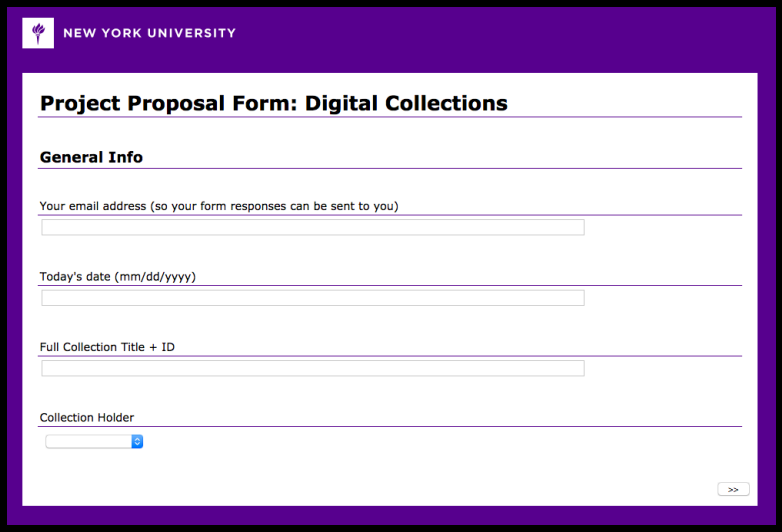
Challenges of PPM

- organizational change
- resource tracking (big brother?)
- goldilocks approach
- discipline & follow through

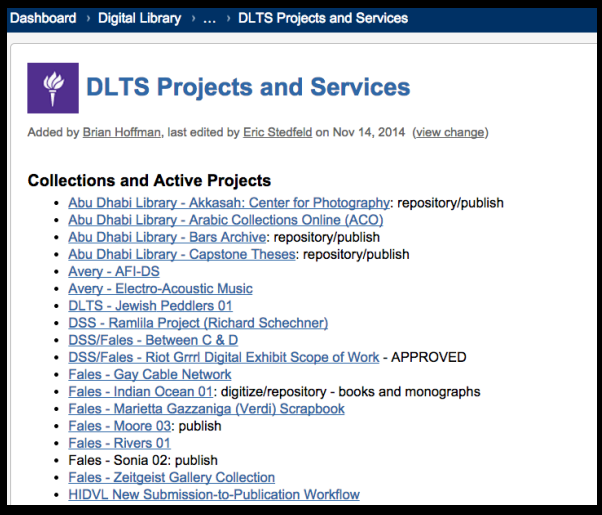
NYU's PPM Process

- project proposal process
- centralized projects list
- projects overview: status, staff, start/end
- regular review: issues, new projects
- decision making, prioritization

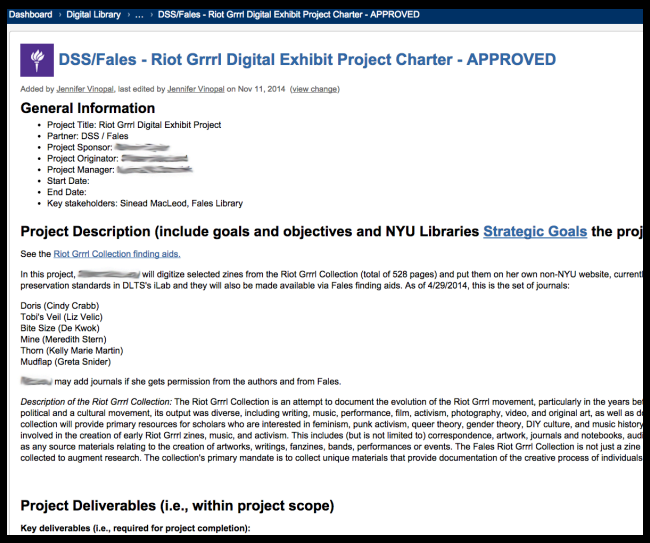
Project Proposal Form: Qualtrics



Projects List: Confluence



Project Charters: Confluence



Dashboard › Digital Library › ... › DSS/Fales - Riot Grrrl Digital Exhibit Project Charter - APPROVED

DSS/Fales - Riot Grrrl Digital Exhibit Project Charter - APPROVED

Added by Jennifer Vinopal, last edited by Jennifer Vinopal on Nov 11, 2014 (view change)

General Information

- Project Title: Riot Grrrl Digital Exhibit Project
- Partner: DSS / Fales
- Project Sponsor: [redacted]
- Project Originator: [redacted]
- Project Manager: [redacted]
- Start Date:
- End Date:
- Key stakeholders: Sinead MacLeod, Fales Library

Project Description (include goals and objectives and NYU Libraries Strategic Goals the proj

See the Riot Grrrl Collection finding aids.

In this project, [redacted] will digitize selected zines from the Riot Grrrl Collection (total of 528 pages) and put them on her own non-NYU website, currentl preservation standards in DLTS's iLab and they will also be made available via Fales finding aids. As of 4/29/2014, this is the set of journals:

Doris (Cindy Crabb)
Tobi's Veil (Liz Velic)
Bite Size (De Kwok)
Mine (Meredith Stern)
Thorn (Kelly Marie Martin)
Mudflap (Greta Snider)

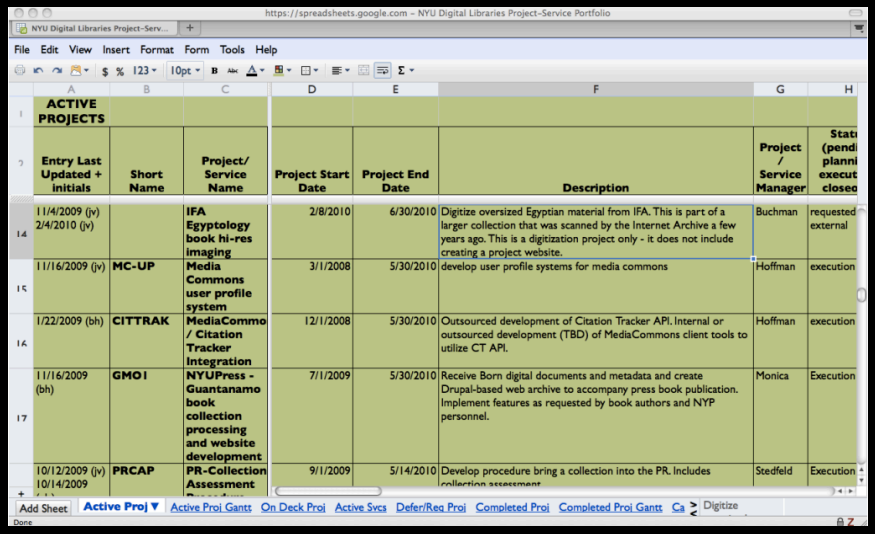
[redacted] may add journals if she gets permission from the authors and from Fales.

Description of the Riot Grrrl Collection: The Riot Grrrl Collection is an attempt to document the evolution of the Riot Grrrl movement, particularly in the years be political and a cultural movement, its output was diverse, including writing, music, performance, film, activism, photography, video, and original art, as well as d collection will provide primary resources for scholars who are interested in feminism, punk activism, queer theory, gender theory, DIY culture, and music history involved in the creation of early Riot Grrrl zines, music, and activism. This includes (but is not limited to) correspondence, artwork, journals and notebooks, audi as any source materials relating to the creation of artworks, writings, fanzines, bands, performances or events. The Fales Riot Grrrl Collection is not just a zine collected to augment research. The collection's primary mandate is to collect unique materials that provide documentation of the creative process of individuals

Project Deliverables (i.e., within project scope)

Key deliverables (i.e., required for project completion):

Previous Projects List: GSheets



https://spreadsheets.google.com – NYU Digital Libraries Project-Service Portfolio

NYU Digital Libraries Project-Serv...

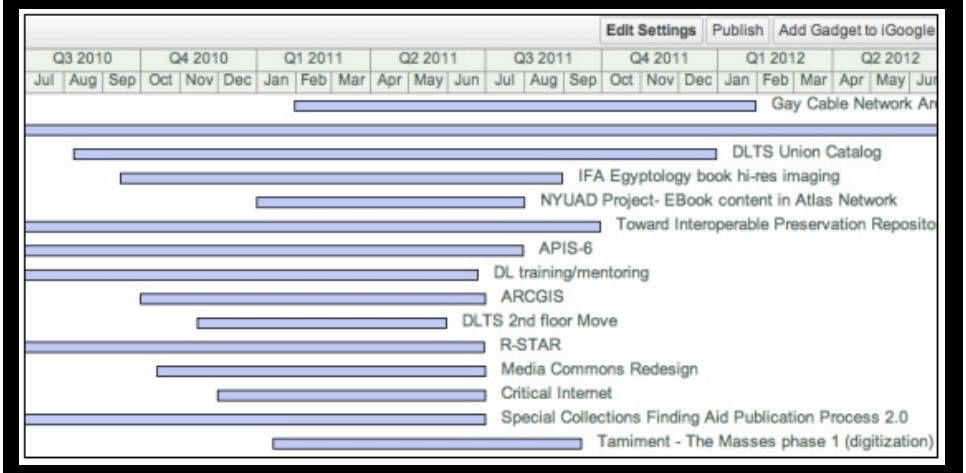
File Edit View Insert Format Form Tools Help

	A	B	C	D	E	F	G	H
1	ACTIVE PROJECTS							
2	Entry Last Updated + initials	Short Name	Project/ Service Name	Project Start Date	Project End Date	Description	Project / Service Manager	Stati (pendi planni execut closed
14	11/4/2009 (jv) 2/4/2010 (jv)		IFA Egyptology book hi-res imaging	2/8/2010	6/30/2010	Digitize oversized Egyptian material from IFA. This is part of a larger collection that was scanned by the Internet Archive a few years ago. This is a digitization project only - it does not include creating a project website.	Buchman	requested external
15	11/16/2009 (jv)	MC-UP	Media Commons user profile system	3/1/2008	5/30/2010	develop user profile systems for media commons	Hoffman	execution
16	1/22/2009 (bh)	CITTRAK	MediaCommo / Citation Tracker Integration	12/1/2008	5/30/2010	Outsourced development of Citation Tracker API. Internal or outsourced development (TBD) of MediaCommons client tools to utilize CT API.	Hoffman	execution
17	11/16/2009 (bh)	GMO1	NYUPress - Guantanamo book collection processing and website development	7/1/2009	5/30/2010	Receive Born digital documents and metadata and create Drupal-based web archive to accompany press book publication. Implement features as requested by book authors and NYP personnel.	Monica	Execution
	10/12/2009 (jv) 10/14/2009	PRCAP	PR-Collection Assessment	9/1/2009	5/14/2010	Develop procedure bring a collection into the PR. Includes	Stedfeld	Execution

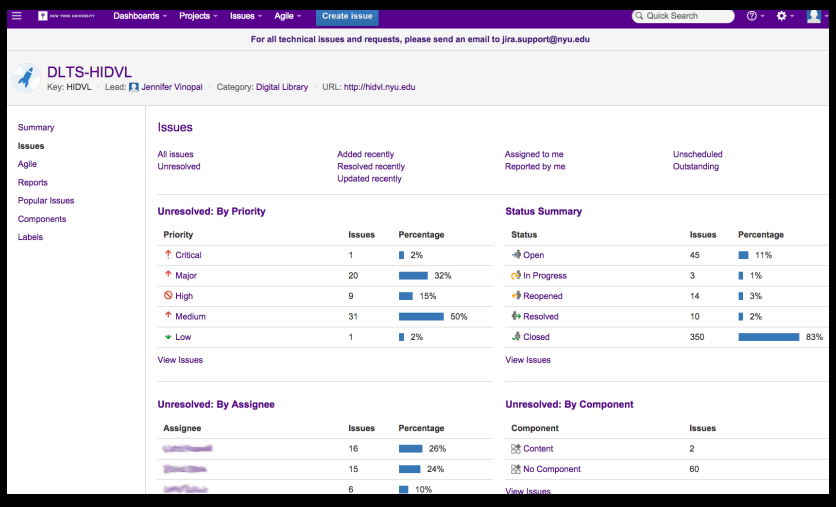
Add Sheet | Active Proj | Active Proj Gantt | On Deck Proj | Active Svcs | Defer/Req Proj | Completed Proj | Completed Proj Gantt | Ca | Digitize

Done

Previous Projects List: Gantt



Project Issue Tracking: Jira



NYU's PPM Process

Weekly PM Meetings Agenda:

1. Project status
2. Milestones/accomplishments
3. Roadblocks
4. Priorities, competing needs