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
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

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)

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, tags, 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
Out of Scope
- Development of brand new apps
- Deep redesign of existing apps
- Custom iPad mobile website
- Native app deployment (iOS/Android)

Team
<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td>Tito Sierra</td>
</tr>
<tr>
<td>UI/UX Lead</td>
<td>Adam Rogers</td>
</tr>
<tr>
<td>Tech Lead</td>
<td>Cory Lown</td>
</tr>
</tbody>
</table>

Schedule
- Launch: 2011-12-8

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
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

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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

<table>
<thead>
<tr>
<th>Task</th>
<th>Subtasks</th>
<th>Respond</th>
<th>Depen.</th>
<th>Start</th>
<th>End</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hire subject specialist cataloger</td>
<td>Create job description for subject specialist cataloger</td>
<td>JV</td>
<td>0</td>
<td>10/5/2011</td>
<td>10/10/2011</td>
</tr>
<tr>
<td></td>
<td>Approval for job description</td>
<td>MB</td>
<td>0</td>
<td>10/10/2011</td>
<td>10/15/2011</td>
<td>COMPLETE</td>
</tr>
<tr>
<td></td>
<td>Post job ad</td>
<td>HR</td>
<td>0</td>
<td>10/10/2011</td>
<td>10/15/2011</td>
<td>COMPLETE</td>
</tr>
<tr>
<td></td>
<td>Interview and hire cataloger</td>
<td>JV</td>
<td>0</td>
<td>10/18/2011</td>
<td>11/13/2011</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>2</td>
<td>Determine publishing and access requirements &amp; restrictions.</td>
<td>Talk to collection owner: Dedicated website or repository? Are there right issues (no permission formats)?</td>
<td>JV</td>
<td>0</td>
<td>10/5/2011</td>
<td>10/30/2011</td>
</tr>
<tr>
<td>3</td>
<td>Identify special collection owner of the digital collection</td>
<td>Talk to 3 special collections and determine proper home for digital collection (may depend on access restrictions)</td>
<td>JV</td>
<td>2</td>
<td>1/1/2012</td>
<td>1/1/2012</td>
</tr>
<tr>
<td></td>
<td>Communication with University Archives</td>
<td>JV</td>
<td>2</td>
<td>1/1/2012</td>
<td>1/1/2012</td>
<td>DELAYED</td>
</tr>
<tr>
<td></td>
<td>Communication with Faire</td>
<td>JV</td>
<td>2</td>
<td>1/1/2012</td>
<td>1/1/2012</td>
<td>DELAYED</td>
</tr>
<tr>
<td></td>
<td>Communication with Tam-Vag</td>
<td>JV</td>
<td>2</td>
<td>1/1/2012</td>
<td>1/1/2012</td>
<td>DELAYED</td>
</tr>
<tr>
<td>4</td>
<td>Set up collection &amp; cataloging environment in DSpace</td>
<td>Determine cataloging requirements with scholar</td>
<td>MM (DSpace service owner)</td>
<td>0</td>
<td>10/5/2011</td>
<td>10/31/2011</td>
</tr>
<tr>
<td></td>
<td>Work with DSpace programmer to set up collection</td>
<td>MM</td>
<td>0</td>
<td>10/5/2011</td>
<td>10/31/2011</td>
<td>IN PROCESS</td>
</tr>
<tr>
<td></td>
<td>Import project flow into DSpace collection</td>
<td>programmer</td>
<td>0</td>
<td>10/5/2011</td>
<td>10/31/2011</td>
<td>IN PROCESS</td>
</tr>
<tr>
<td>5</td>
<td>Train Cataloger</td>
<td>Introduction to DSpace &amp; project-specific cataloging</td>
<td>MM, w/JV, 1, 4</td>
<td>11/1/2011</td>
<td>11/30/2011</td>
<td>PLANNING</td>
</tr>
<tr>
<td></td>
<td>Create text catalog records and QA with scholar</td>
<td>cataloger</td>
<td>11/30/2011</td>
<td>11/30/2011</td>
<td>PLANNING</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Catalog project materials</td>
<td>Create a record for each item in the collection</td>
<td>cataloger</td>
<td>12/1/2011</td>
<td>1/1/2012</td>
<td>PENDING</td>
</tr>
</tbody>
</table>

Example Gantt, Critical Path

<table>
<thead>
<tr>
<th>ID</th>
<th>Task Name</th>
<th>Predecessors</th>
<th>Duration</th>
<th>Jul 23, '08</th>
<th>Jul 30, '08</th>
<th>Aug 6, '08</th>
<th>Aug 13, '08</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Start</td>
<td></td>
<td>5 days</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>a</td>
<td>1</td>
<td>4 days</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>b</td>
<td>1</td>
<td>5.34 days</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>c</td>
<td>2</td>
<td>5.17 days</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>d</td>
<td>2</td>
<td>6.23 days</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>e</td>
<td>2</td>
<td>5.17 days</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>f</td>
<td>5</td>
<td>4.5 days</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>g</td>
<td>6</td>
<td>5.17 days</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Finish</td>
<td>7,8</td>
<td>5 days</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Creating the Task List

Estimating Task Time

Activity 5: Start Task List

- Small post-its
- 1 task per post-it
- Distinguish between 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/

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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/

Other Resources

- “Crowdsourced Library Project Management Toolkit,” n.d. https://docs.google.com/document/d/1aCZaSefh1VsvkOH4ksZDh6exzAH7n8_mMrpnw4ylNcl/edit?usp=sharing
- Digital Library Federation Project Managers Group listserv: DLF-PM-GROUP@LISTS.CLIR.ORG
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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
Why Portfolio Management?

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

What is PPM?

• comprehensive inventory
• ongoing process
• regular review, strategic vision
• governance, decision making
• guessing → knowing
### What do you track?

<table>
<thead>
<tr>
<th>Project name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start/end dates</td>
<td>Priority</td>
</tr>
<tr>
<td>Brief description</td>
<td>Notes</td>
</tr>
<tr>
<td>Project manager</td>
<td></td>
</tr>
</tbody>
</table>

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### What else can you track?

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

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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

Previous Projects List: GSheets
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