Introduction to Project Management for Libraries

Jennifer Vinopal / @jvinopal
Manage and participate in many projects, both large and small at NYU as well as DLF


Caveats about today’s workshop:

My experience comes through practice and through some more formal training (workshops); but crucial learning through practice.

- I’ve found PM workshops and books to be very business focused. While the concepts are useful, they do not take into account the kinds of environments we are working in: Not-for-profit, academic
- also we traditionally have no project management culture -- little understanding and practice of project management or portfolio management
- So the nuts/bolts you’ll get today are based on what I have found works for me and for my many colleagues in libraries with whom I’ve talked and worked
- That is to say: this is not at all a workshop to get you to PM certification. It’s intended to get you working effectively.

I’ve spoken about project management formally and informally; I coach colleagues when I can and seek advice from others regularly.

I’m always trying to improve so I look forward to hearing constructive criticism about the workshop during or afterwards.

I welcome questions throughout. This workshop is for you, so I want to make sure to answer questions and have discussion. I’ve got a plan with activities, but you should also drive.
Introductions

Who are you?

- PM training or experience?
- Previous work in libs?
- Name
- 2 sentences about your project
Workshop Structure

“Talk, do, discuss” approach
1. What is Project Management?
2. The Project Charter (activity)
3. The Project Plan (activity)
4. Project “Execution” (if time)

Break somewhere around 4?
First of 4 topics: What is Project Management

Let’s break this down into parts.
What is a Project?

“an endeavor of limited duration, with a defined beginning and end, using specified and allocated resources (staff, money, equipment, etc.) to accomplish a specific objective.” (vinopal, 2012)

First, what is a project?
What is a Project?

- limited duration
- defined beginning and end
- resources
- specific objective

- So a project is not a service
- It’s not an ongoing initiative
- It’s not a high-level goal or hope to get something done
- It’s not a concrete plan to do something at some unspecified date in the future
What is a Project?

- TIME: limited duration defined beginning and end
- COST
- SCOPE: specific objective

A project has three key constraints: time, cost/resources, and scope (i.e., how much work you will accomplish, what you will/won’t do).

Well planned and managed projects define these three constraints up front.

In planning and executing a project these three parameters are related to each other; they are tightly linked, interdependent.
If you google this Project Management triangle, you’ll see it is represented in various ways. The pictures may use different terms and the constraints are typically laid out on the points rather than the sides. But this is the way that makes the most sense to me.

The balance among these three constraints defines the quality of the outcome. (Quality = how many widgets, of what quality, etc.) You define the constraints and anticipated quality up front before you start the project (project of such and such a scope will take us so much time, costing us x dollars) The expectation is that given the defined constraints, your outcome will be a certain level of quality.

Example:
A CLIR Fellow’s library project to evaluate an archival collection, create a finding aid, and digitize select items for a web exhibit.

- Imagine we allot 6 months for collection evaluation, 3 months to create the finding aid, and 3 months to digitize select items and create the exhibit (that’s the scope)
- Cost is 12 months of various staff hours + cost of equipment to digitize the materials, create finding aid + cost of the systems and software to store the digitized assets + cost of the website
- However, we didn’t set aside time for user testing of the website (OOPS!)

Expectation of Quality = iffy.

How to fix this problem?
1. Increase time (add 3 months?)
2. Decrease scope of other activities (less time for digitization or description?)
3. Increase cost: hire additional staff to work on the website
What is Project Management?

“the process by which an individual project is organized, overseen, and administered throughout its duration.” (vinopal, 2012)

Job of project manager (or managers, if the project is very large or distributed – in which case you need to figure out how the work will be coordinated)
What is Project Management?

organized
overseen
administered
Planning is the first stage (but continues to happen throughout)
  • Monitoring & Control happen during execution.
  • Monitoring = observing, analytics, checking in: “how are things going?”
  • Control = more active – influencing how the project is done, making corrections, escalating issues, doing some of the work when appropriate

Includes risk analysis and intervention – planning for risks, or when you realize a mistake has been made figuring out how to fix it.
What does the Project Manager do?

organizes, oversees, and administers the duration, resources, and objectives of the project.
How do you do that?

- define scope
- plan (resources, time, $)
- monitor execution & scope (creep)
- facilitate & communicate
- escalate when necessary
This is what we’re going to talk about and you’re going to do next.
But first – a few words about library culture.

... so PMs need to rely on their strong people skills to persuade and demonstrate benefits

Before we move on – questions or comments?
The Project Charter

Second of 3 topics today (hands on work after this one)
Why Projects Fail (Sierra, 2011)

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

Acknowledge these are borrowed from Tito Sierra’s “Project One-Pager” presentation.
Nearly all of these are laid out explicitly in the project charter. The purpose of the charter is to prevent these things from happening.

Creating the project charter is the project manager’s responsibility.
The project charter

- first and crucial step of the project
- iterative process
- define scope, goals, deliverables
- list resources (staff, $, equipment)

Goal: document agreement of all parties (sponsor, stakeholder, staff)

Note on defining requirements, features, and deliverables: many ways to do this including user stories, brainstorming, interviewing stakeholders and users, etc.
Reminder: this is the time to define all of these things, to explain how they relate to each other, and to set expectations for the quality of your outcomes.
Basic Project Charter Format

1. Project name
2. Description (high-level statement of your project goal)
3. Success criteria (how will we know when the project is done?)
   - SMART goals

For success criteria: If you like, SMART goals: Specific, Measurable, Attainable, Resourced, Time-bound
If the project is small, I simply use the charter as my project organizer. Call it “Project Home Page”
Where do you get the information to fill out the charter?

- Grant application
- MOA
- Conversations with stakeholders
- Correspondence
- Other?
Iterative Process

• Write a draft
• Share it with project team
• Share it with stakeholders
• Rewrite
• Repeat until *consensus*
This is your covenant. You will wield it throughout the project.

It won’t prevent people from trying to change the project, and it won’t necessarily prevent the project from changing. But it will allow you to explain how changes to the scope, time, and resources will negatively affect outcomes.
Activity 1

Write a draft project charter

• 10-15 minutes on your own
• then partner to critique & improve
Questions to ask

- Are description/success criteria clear and complete?
- Have I listed non-deliverables?
- Have I included all key dates?
- What information am I missing?
- Where can I get missing info?
Questions to ask, cont.

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

If not, you’re doomed. So fix it.
Activity 1 feedback
Part 3 of 4
Basic Plan Includes

- Charter
- Schedule (“work breakdown structure”)
- Time estimates
- Risk plan, if appropriate

[Communication & change plans]
Today we’re concentrating on these parts. These plus good instincts will get you very far.

Something about risk plan: I’ve never done a formal risk and risk management plan. However
1. I do constantly look out for risk as I monitor the project (ask “how are things going?” Note when deadlines are slipping. Etc.)

2. I talk about risk a lot when I see project scope changing. Need to speak calmly and with precision: what is a risk? how much? why? How to mitigate it? If you can’t, what other changes must be made? It’s a negotiation.
PM Tools

- Google doc + spreadsheet
- Word doc + spreadsheet
- Wiki + spreadsheet
- Bulletin board + index cards
- Pen & paper

- Keep your project management lightweight, easy to access, easy to share with your team.
- Here are some simple solutions that you likely already have access to.
- What matters is that everyone who needs to see the information can get to it. You are not a gatekeeper.
PM Tools, cont.
• Asana
• Teambox
• Trello (agile)
• Evernote
$ Basecamp (wiki for PM)
$ Jira/Grasshopper (tkt, agile)
$ Smartsheet
• Microsoft Project

• A few free or for-fee tools.
• Microsoft Project is heavyweight and overkill

• What you use should depend on the preferences & expectations of your team (organizational culture) and only then your own preferences.
• Your job is to make everyone else's jobs easy, or at least do what you can to allow them to focus on their jobs.
• You should use the easiest method you can get away with. Everything else is a time sink and procrastination.
  • Example: at NYU the developers use Jira for issue tracking. Is Jira my favorite tool? No: I personally use Evernote. But they're already in Jira every day, so I use it too.
  • We also have Confluence wiki, but no one likes it. So I don't use it because I don't like it either.
  • No one in DLTS wants to ever have to look at a Gantt chart, so I would never organize and present information that way. If I did use one, I wouldn't show it to them.
  • My method:
    • Project folder in Google Docs shared with the team.
    • Project Home Page (charter), with all other project pages linked from the bottom of the home page.
  • If a small project, I put brief schedule right in the Charter. If a larger project, I use a Google spreadsheet for deliverables, tasks, and time estimates.
PM Tools, cont.

Don’t get hung up on tools. Focus on planning and communication.
This is how I document a plan: column headings...

- Keep the schedule structure simple.
- Developing the plan is an iterative process (like the charter) – make a plan, run it by the team, revise, repeat.
- Spend time identifying and ordering the tasks and dependencies that will get you to the deliverables (this will determine your timeline)
If you line up all your dependencies and the combined time = longer than the allotted time, you have a problem.

Options:
- Make the project longer
- Work more quickly (and maybe lose quality)
- Get more resources
- Re-scope the project to reduce # of deliverables.

These are difficult decisions (especially quality) - How do you talk about these things?
Example Gantt, Critical Path

Image from Wikipedia http://en.wikipedia.org/wiki/Gantt_chart
Faculty collection digitization and cataloging project:

- Several significant scope changes happened over the past few years:
  - Plan was originally based on putting materials into one repository; now materials are going into another repository which hasn’t even been fully developed yet
  - Also, original plan was to end the project in July 2014. Now the plan is to end in December 2013 (lose 7 months of work time)
  - In addition, the faculty stakeholder decided to add more materials during the last 9 months of the project
  - It’s impossible.

- PM’s job is to contain risk and think creatively when things start to go wrong.
  - PM must tell the truth about the project. Don’t sugar coat things.
  - No one’s interests are served by beating around the bush about bad news.

- I spoke to my boss and to the faculty member. Explained that more materials + early project end date = less time for cataloging. Everyone agreed that this wasn’t ideal, but was necessary.
  - So: a decline in quality.
Creating the Task List

• Discrete tasks + assignments
• Do it with the team (they’re the specialists, you facilitate)
• Order and dependencies
• Iterative
Estimating Task Time

- Do it with the team
- Make your best estimate then
  adjust up
- Various techniques

Techniques:
- 1-on-1 interviewing (OK for small projects, not for large projects)
- Team discussion
- Planning poker (for estimating time in agile projects)
  - Everyone estimates how long a given task will take, then shares their estimates with the team
  - If you have consensus, great. If not, discuss for 3 minutes. Then vote again.
  - If consensus, great. If not, repeat, move on, or pick the high estimate and move on. (Set rules in advance)
  - Can be played with estimating cards which have estimating numbers on them (1, 2, 3, 5, 8, 13, etc.)
  - Can also be used for ranking importance of features (if this is appropriate for the team to do).
Estimating Task Time

Everything always takes longer than expected.
It always takes me a long time to break the larger tasks down into subtasks and put them in order.

Do time estimates only if you have time

Refer to your charter to make sure all your requirements are represented in the project plan!
Activity 2 feedback
Project “Execution”

4th and final part. This one is short.
Team meetings

• Regular (repeating)
• Efficient & productive
• Focus on task list
• Identify roadblocks
• Revisit charter if necessary
• End with review of to do items

Team meetings goal:

• Review tasks
• Make sure handoffs are working smoothly
• Identify roadblocks and identify who will fix
• Use the charter to remind people of scope “Back in September we agreed that…”
• Always end meetings (all meetings!) with a review of to do items – Who has the ball?

• PM is an enabler, make the road smooth for the project team.
• PM is a communicator.
  • Escalate problems to decision makers & make sure you get decisions
  • Keep everyone informed of status, changes, etc.
  • Be the go-between among communities (leadership, team, users)
  • Sometimes also the administrative assistant or secretary
Considerations

- Iterative releases based on feature priorities
- Workflow design
- Develop generalizable workflows or tools

- Depending on the kind of project, you could consider iterative releases of your product
- Workflow design: you may need to spend time up front or if you run into roadblocks mapping out project workflow
  - Example: we realized that handoffs between teams wasn’t going as smoothly as it should have. When one team finished something, next team team didn’t always know it was time to take up the next phase of the project.
- Can also consider developing generalizable workflows or tools. Use project 1 to develop workflows/tools that can be re-used in project 2, 3, etc. to make them easier.

- Re. Scope Creep: If someone comes up with a new idea in the middle of the project My friend Delphine Khanna says: “let’s put it in Phase 2” – she calls this the “best trick ever”
The challenge of having responsibility but no authority. In my projects, the team members are not my staff. We all report up to a common boss.

- Think about how to influence
- Keep project front and center (not about personal issues)
- Escalate up to decision makers if necessarily. But DON’T TATTLE TO MOMMY.

Some people prefer meetings, some prefer informal discussions in office or at water cooler. Some don’t like using the calendaring system. Some like email, others despise it.

Help people communicate with each other in meetings. Say things like “If I understand you correctly I believe you are saying...”
Your thoughts on situations where you have responsibility but no authority?
Closing

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

Celebrate!
Also, do you have any questions about library culture and PM that I might try to address?
Common questions

• Organizational culture: how to introduce PM into an org? Leading from the middle.
• How to Manage up?
• Upper level admin drops a project on you. What to do?
Thank you!
Credits


Other Resources

- Digital Library Federation Project Managers Group listserv: DLF-PM-GROUP@LISTS.CLIR.ORG
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