Introduction to Project Management for Libraries

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Managed and participated in many projects, both large and small at NYU and through the Digital Library Federation.


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.
Introductions

Who are you?
- Name
- Institution
- 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: portfolio management,...]
Weaving in your questions

• The basics, project charter
• Keeping track
• Tools / process
• Small projects
• Working with teams
Your questions, cont.

- Organizational culture (how to introduce PM into an org)
- Managing up
Workshop Structure

1:00 start
2:00 short break
3:00 longer break
4:00 short break
5:00 end

Approximately.

If you need a break let me know.
First of 4 topics: What is Project Management

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

First, what is a project? You tell me.
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
A project has three key constraints: time, cost/resources, and scope. 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. You define the constraints 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 project to research, select, and implement a web-scale discovery platform.
- Allot 6 months for research, 6 months for implementation (ambitious/aggressive timeline)
- No time set aside for user testing
- Cost is X numbers of staff hours + 100 hours of consultant time during implementation (probably not enough consultant time)
- Scope is to review top contenders in the field, chose one, implement the chosen solution out of the box, no customization aside from basic set-up options (in a nod to the aggressive timeframe)
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?

overseen  organized
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
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
How do you do that?

- define scope
- plan (resources, time, $)
- monitor execution & scope (creep)
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- escalate when necessary

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

Second of 4 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 in the project charter.
Who’s responsible for preventing failure?
“I never feel confident knowing if what I am doing is good or not. As an IT person, I tend to "jump in and do it", which can create a bumpy road if you do not take proper time for planning.”

Exactly! We are all doers and want to get to work. Planning is hard, boring, annoying. And it requires building consensus, which is hard, annoying.

But planning sets the roadmap and tells you where you’re going, how you’re going to get there, and how to know when you’ve arrived. If you don’t do it you’re doomed.
What is a 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?)

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”

Project charter format

4. Requirements (deliverables, optionals, & out of scope)
5. Project team (including roles)
6. Milestones/Schedule (high-level + proposed dates)
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, plus the info (the argument implicit) in the PM triangle, 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 in 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
- You may not have all the information you need today to write a complete charter. But you should identify what information is missing and where you will get it.
- When you get home you need to get feedback from the team and stakeholders.
- If you finish more quickly, help out your neighbor. You get better at this through practice.
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
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.
- 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 (txt, 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.
PM Tools, cont.

Don’t get hung up on tools. Focus on planning and communication.
The Project Schedule

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

- 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 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?
Several significant scope changes happened over the past few months

- 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 project in July 2014. Now plan is to end in December 2013 (lose 7 months of work time)

PM’s job is to contain risk and think creatively when things start to go wrong.

- PM must tell the truth about the project.
- No one’s interests are served by beating around the bush about bad news.
Several significant scope changes happened over the past few months:

- 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 project in July 2014. Now plan is to end in December 2013 (lose 7 months of work time).
- In addition, faculty stakeholder is asking to add more materials at the last minute (creating new materials in October to be included for the December end-date).
- 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.
• What is going to suffer? Quality. The cataloging quality will go down. I just had this conversation with the faculty member and the cataloger.

• Also, doubtful we can add the new materials. Or, if we do, doubtful there will be time to catalog them.

• No PM is immune to these kinds of changes. It’s a natural part of working with humans – they change their minds.

• PM’s job is to contain the madness: calmly lay out the facts and the options, make others understand the stakes involved.
Creating the Task List

- Discrete tasks + assignments
- Do it with the team (they’re the specialists, you facilitate)
- Order and dependencies
- Iterative
PM a little like being a reference librarian: You don’t have to know the answers; you just need to know where to find them. Your job is to get it organized and keep it that way.

Techniques:
- 1-on-1 interviewing (not best)
- 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.
Activity 2: Start Project Plan

- Use a spreadsheet, doc, or paper
- focus on tasks, ordering, & dependencies
- on your own or with a partner
- if on your own, then get feedback
- 15-20 minutes

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
Activity 2: Feedback

It always takes me a long time to break the larger tasks down into subtasks and put them in order.
Project “Execution”

4th and final organized 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 either based on feature priorities set earlier in the project, or based on a release and test model. (Release a UI, test it, revise and improve)

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 to make it easier.

Re. Scope Creep: My friend Delphine Khanna says “If someone comes up with a new idea in the middle of the project she says: put it in Phase 2 - This is 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 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...”
Problems that derail

• Responsibility but no authority?
• Other?

Your thoughts on situations where you have responsibility but no authority?
Looking back at my first two big projects I’m in dismay; part of me feels like they got done despite me.
No training, no coaching, no mentoring.
New to Digital Library initiatives; never worked on an IT project before.
No-cost extensions on grants.
Excellent team – lucky me!

I didn’t even know to do an AAR when they were done.
Closing

Celebrate!
We can take time to talk more about the questions you raised in the survey, or you can have more time working through project issues.
Your questions

• Organizational culture: how to introduce PM into an org? Leading from the middle.
• How to normalize PM across groups with different approaches (IT vs. non-IT, etc.)
Your questions

• How to Manage up?
• Upper level admin drops a project on you. What to do?
• Jump in and do vs. planning
• Large projects vs. small?
• PM in complex, risk-averse orgs?
If there’s time...

Options:
• More work on project plans & time estimates
• Portfolio management
• Other?
Portfolio Management
Why PPM?

PPM ensures that project work supports the organization’s strategic vision, active projects represent the highest priorities of the organization, and there are enough resources to accomplish all the project work at hand. (vinopal, 2012)
Why PPM?

• Alignment (vision/goals)
• Resources (budget, time)
• Risk management (project, portfolio, enterprise)
• Evaluate performance, benchmarking
Why PPM? cont.

- Surface hidden interdependencies
- Address inadequate PM processes
What is a Project Portfolio?

- A list or inventory of all the present and future projects of the organization (dept, inst, etc.)
- May include services info (re. resource availability)
PPM Process

• Regular review of portfolio
• Governance team with authority
• Data-driven decision making
• Move from guessing to knowing
PPM can answer

- Who is overcommitted?
- How often do projects end late?
- When will we be able to take on new projects?
- How are we performing as an organization?
PPM Difficulties

- Organizational change
- Resource tracking (big brother?)
- Goldilocks approach
- Discipline & follow through
PPM Tips

• Introduce change incrementally
• Know what you need
• Iterate and learn
PPM tracking
- Project name
- Start/end dates
- Brief description
- Project manager
- Status
- Priority
- Notes

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## PPM tracking

<table>
<thead>
<tr>
<th>Entry Last Updated</th>
<th>Short Name</th>
<th>Project/Service Name</th>
<th>Project Start Date</th>
<th>Project End Date</th>
<th>Description</th>
<th>Project Manager</th>
<th>State/Remarks (Name)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/14/2009 (or)</td>
<td>BUP</td>
<td>IFAEgyptology book in-res imaging</td>
<td>2/6/2010</td>
<td>6/30/2010</td>
<td>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.</td>
<td>Buchanan</td>
<td>requested external</td>
</tr>
<tr>
<td>1/16/2009 (or)</td>
<td>MediaComm</td>
<td>MediaComm user profile system</td>
<td>3/1/2008</td>
<td>3/30/2010</td>
<td>develop user profile specimen for media commons</td>
<td>Hoffman</td>
<td>execution</td>
</tr>
<tr>
<td>1/22/2009 (or)</td>
<td>CITRAK</td>
<td>MediaComm/CitationTractor integration</td>
<td>12/1/2008</td>
<td>3/30/2010</td>
<td>Outsourced development of Citation Tracker API, internal or outsourced development (TBD) of MediaComm client tools to utilize CT API.</td>
<td>Hoffman</td>
<td>execution</td>
</tr>
<tr>
<td>5/13/2009 (or)</td>
<td>PR-CAP</td>
<td>PR-Collection Assessment</td>
<td>9/1/2009</td>
<td>8/14/2010</td>
<td>Develop procedure bringing a collection into PR. Includes evaluation assessment</td>
<td>Smithfield</td>
<td>Execution</td>
</tr>
</tbody>
</table>

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PPM tracking

- DLTS Union Catalog
- IFA Egyptology book hi-res imaging
- NYUAD Project: EBook content in Atlas Network
- Toward Interoperable Preservation Repositories
- APIS-6
- DL training/mentoring
- ARCGIS
- DLTS 2nd floor Move
- R-STAR
- Media Commons Redesign
- Critical Internet
- Special Collections Finding Aid Publication Process 2.0
- Tamiment - The Masses phase 1 (digitization)
Thank you!
Credits


Other Resources

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