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Introducing Project Management to the Library

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Good morning and thank you for coming to this presentation. My name is Dennis Smith and I'm going to be discussing Introducing Project Management to the Library.

Background

My journey to project management



Just a little background about myself. I began working in libraries over 15 years ago. From my first position, projects were a significant part of my work. In one of my positions, I was asked to take on a couple of projects at the same time and there were more on the way. That's when I began to looking for ways that would help me. While working at Brandeis University, I found a program on project management. That was the light bulb moment and I haven't looked back. As many of you may know, one of the leaders in project management is the Project Management Institute (PMI). They have a PM certification, numerous publications and resources about project management.

Project Management

Application of knowledge, skills, tools, and techniques to project activities to meet project requirement.

(4pmti.com)

Here you can see the a sample definition of project management.

One of the driving forces for our work on project management in industry was to bring some balance between the process of projects and the projects' goals and outcomes in order to increase success. It is used to reduce risks, costs while helping complete projects on time.

Project Management (PM) at WVU Libraries

Application of knowledge, skills, tools, and techniques to project activities to facilitate working relationships, improve communication and complete projects.



Libraries

I, however, approach project management a little differently especially when working in libraries. Here is how I would define how I approached PM at WVU. (Read Quote)

Benefits of PM

- Collaboration
- Communication
- Transparency

So for our libraries at WVU, I really wanted to introduce elements of PM that helped contribute to Collaboration, Communication, and Transparency for our organization.

Project management vs. project collaboration

They're siblings, not twins

(atlassian.com)

So I think it is important to note that often PM and Project collaborations are seen as the same thing. However, they are related but not the same. Good project management should encouraged project collaboration (and future collaboration).

Discovery Research Project (and Installation Project)

So I'm going to share our first experience of introducing PM to our libraries. Our first project was research and compare our current discovery (OCLC) with alternatives to see if there was a better solution for our patrons. This project was in the early stages when I became involved and already facing some challenges. I'll also share experiences with the follow up project to install a new Discovery system.

To begin, I took the team back to the beginning.

Project Management at WVU Libraries

Planning



Shared Understanding, Expertise,
Buy-In, etc.

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Part of this process was to change how we planned projects. Although there had already been some work on this project, I started with developing a new project plan draft. Then I brought the project team together to collaborate on the project plan, collecting expertise, and building out the plan. Then we shared this draft plan with the Libraries Leadership Teams which includes all libraries and department heads. The goal was to communicate and collaborate to building a strong shared plan for the project.

Project Management at WVU Libraries

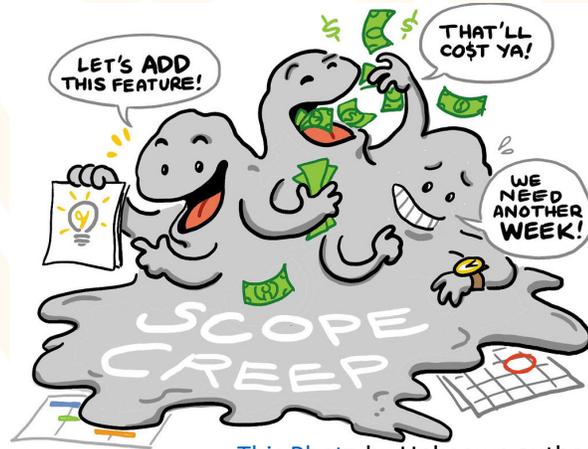
Project Plan

- **Scope**
- Schedule
- **Stakeholders**
- Project Team
- Requirements
- Project resources
- **Communications plan**
- Work Breakdown Schedule (Tasks)
- Risk management
- Budget

So here are some of the elements of our project plan. I've highlighted some of the important elements that I feel are pillars of a good project. I started with a rough project plan and called the first meeting of the project team.

Project Management at WVU Libraries

- Scope
 - In Scope
 - Out of Scope
 - Scope Creep



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So one of the most important elements of a project plan is scope. As we began discussing this project, it soon became apparent that the scope had not been fully discussed. This gave the project team a chance to really define what we want to do and then share this with the departments so that we all had a shared agreement for the project. One of the most important parts of communication is to ensure that the project has a clear Scope. As you collaborate and communicate, knowing what the project's goals are is important. It is also part of collaborating the project team knows what is not part of the project to prevent additional work or goals for creeping into the project. Knowing this allows the project team to communicate clearly on what the project is trying to accomplish.

Project Management at WVU Libraries

Stakeholders

- Project Team
- Leadership Team
- Library Team
- Campus Team
- Other Teams



This is another area that I feel is often overlooked. It is important that the project team thinks about everyone affected by the project (including themselves). Often I think that people think of stakeholders as having a direct connection to the project, which is true. But often there are stakeholders who have an indirect connection. Transparency is when both are informed and kept up to date.

On our project, we had to consider some of our direct stakeholders, librarians who would be evaluating the system, as well front end staff. Since we were only “evaluating” these systems we could have kept this narrow, but considering the impact of a new discovery tool, we took a wide view on stakeholders. So getting students and faculty involved as well as all library staff was important.

Look for those indirect stakeholders. We discussed who were stakeholders and how they would be effected. This was important part that really drives another area of the project plan that I feel is one of the most important parts.

Project Management at WVU Libraries

Without a sufficient project communication plan, it's impossible to keep all responsible parties up-to-date on the changing status of the project.

(kissflow.com)

So here I feel is one of the most important parts of a project plan. The communications plan.

Project Management at WVU Libraries

Examples from the Communication Plan

- Regular Project Meetings
- Leadership Team Updates
- Staff Newsletter
- Updates to All Staff
- Project Documents available on Intranet



Libraries

So in our project, we discussed all aspects of the communication plan. First, how were we as a project team going to communicate. How often were our meetings, where we were going to keep our shared files, where we were going to put our files for everyone to see (transparency).

We discussed how we were going to update administration, Leadership Team and the Library Staff. So this is how we took communications to transparency.

Examples from our project plan included Regular Project Meetings, regular updates to the Leadership Team Updates, articles in our Staff Newsletter, update emails to All Staff and making our Project Documents available on Intranet.

One great example is that although we picked out groups to test the discovery tools, we also worked to update staff and allow them to test the tools. We provided a feedback mechanism which we incorporated into our evaluations.

March 2020



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As we worked our way through this project, the COVID lockdown began and left us with a four-month gap in our project. When we went to restart, having the project plan in place and working collaboratively, we made adjustments to complete the project and shared these changes with the organization and stakeholders.

Restart? Or Start Over?

So during the summer of 2020 and we began to move from emergency to somewhat regular operations, we pulled out our project plans. The benefit of the work we had done is that we didn't start from scratch. We reviewed our plans, modified them in the age of COVID and began our project. Using our communications plans we worked through each step of the project and ultimately had stack of information. So we moved to the next step.

Discovery Evaluation Report



Final Report. As we began writing our final reports, we continued with the themes of collaboration such as getting input and sharing the recommendation "before" it was final. We shared it with the leadership team and departments to get feedback and additional input. Some of the key takeaways from this experience is that we learned to collaborate a little better, we learned how important communication is and we helped others who may not have agreed with some of our decisions to see how and why we came to those decisions. We shared the final report with the libraries and posted it on the intranet. All of these efforts helped to bring transparency to our work. We continue to learn as we continue to refine these process on other projects.

Project Management at WVU Libraries

Repeat, but better...

This project led to a recommendation to select a new discovery service for the libraries. So upon approval, we started this process over again.

Project Management at WVU Libraries

Transparency is defined as “*the quality of being done in an open way without secrets.*” In the realm of projects and processes, it means creating a project management system in which all team members* can access all relevant information about a project easily and efficiently.

(Kissflow.com)

*Library Staff *Stakeholders

Thank You

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Libraries

One final quote to leave you with.

References

- <https://kissflow.com/project/how-to-improve-project-transparency/>
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