More with Less: Project Management for Beginners

Anthony Molaro, Assistant Professor, St Catherine University
Kelly McBride, Director, Osceola Public Library
Who Are We?

● **Kelly**
  ○ Director, Osceola Public Library
  ○ MLIS from St. Catherine
  ○ Former employment: Minneapolis Public Library, South Central
  Minnesota Inter-Library Exchange (Mankato, MN), University of Minnesota Duluth Library.

● **Kelly’s Projects**
  ○ 4.5+ mil. Capital Campaign
  ○ Summer Learning Program
  ○ Rhubarb Days Festival
  ○ Mobile Discovery STREAM
  ○ Website Redesign
  ○ Renovation Projects
Who Are We?

● Tony
  ○ Assistant Professor, St Kate’s
  ○ Consultant, Library Strategies
  ○ Dean Library and Instructional Services, Prairie State College
  ○ Director, Highwood Public Library
  ○ Head of Technology and Technical Services, Messenger Public Library
  ○ Instruction and Reference Librarians, Grand Valley State University

● Tony’s Projects
  ○ $70 million Mary Idema Pew Library
  ○ Multiple Renovations
  ○ ILS Migration
  ○ Launched Institutional Repository
  ○ Collection’s Projects
  ○ Accreditation and New Programs
  ○ Various small projects
Why Should You Care?

Project management is like a bowl full of kittens. It just magically makes life better.
Why Should You Care?
## What is a Team

<table>
<thead>
<tr>
<th>Understanding</th>
<th>Group</th>
<th>Team</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members think they are grouped together for administrative purposes only.</td>
<td>Members recognize their independence and understand both their personal and team goals are best accomplished with mutual support.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ownership</th>
<th>Group</th>
<th>Team</th>
</tr>
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<tbody>
<tr>
<td>Members tend to focus on themselves or their department needs because they are not sufficiently involved in planning the library’s objectives.</td>
<td>Members feel a sense of ownership for their jobs and unit, because they are committed to value based common goals that they helped establish.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Creativity &amp; Contribution</th>
<th>Group</th>
<th>Team</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members are told what to do rather than being asked what the best approach would be.</td>
<td>Members contribute to the organization’s success by applying their unique talents, knowledge, and creativity to team objectives</td>
<td></td>
</tr>
</tbody>
</table>
is this really a team?

1. compelling direction
2. outcome:
   - an effective team
   - delivery to client requirements
   - team capability growth
   - individual learning
3. enabling team structure
4. supportive organisational context
5. effective coaching
Why Should You Care?

10 Reasons teams sink:

- Lack of clarity
- Lack of vision
- Lack of resources
- Lack of accountability
- Lack of planning
- Lack of encouragement
- Lack of conflict strategies
- Lack of collaboration
- Lack of inclusion
- Lack of reinforcement
Why Should You Care?

10 Reasons teams sink:

- Lack of **clarity**
- Lack of **vision**
- Lack of **resources**
- Lack of **accountability**
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- Lack of **collaboration**
- Lack of **inclusion**
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Why Should You Care?
Why Should You Care?

![Diagram of Project, Unplanned, and Project Management]
Why Should You Care?

If you don’t use a project management method you are more likely to have:

- Project failure
- Project exceeds budget or time constraint
- Projects bump into each other (think of road construction)
- Project issues cause burnout or loss of respect for team involved
Why Should You Care?

A 2010 study found the following:

- Decreased failed projects by 31%
- Delivered 30% of projects under budget
- Demonstrated a 21% improvement in productivity
- Delivered 19% of projects ahead of schedule
Why Should You Care?

Benefits of using project management

- Clarity - what are you trying to do and why
- Focus - it’s easy to get stuck in the weeds
- Team - the whole team (and library) has a sense of where you
- Altitude - see the forest for the trees
Project Management isn’t Scary

Project management isn’t scary. Think of a new project as an adventure or story you get to participate in.
Project Management isn’t Scary
What is Project Management?

- A Project
- Project Management
- Project Manager
Project

A project is a temporary endeavor undertaken to create a product, service, or result. It almost always has a budget.
## Routine vs. Project

<table>
<thead>
<tr>
<th>ROUTINE WORK</th>
<th>PROJECT WORK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Updating a website</td>
<td>Redesigning a website</td>
</tr>
<tr>
<td>Cataloging books</td>
<td>Migrating to new ILS</td>
</tr>
<tr>
<td>Repetitive reference work</td>
<td>Launching new service based on stuff Nina taught us</td>
</tr>
<tr>
<td>Summer reading program</td>
<td>Summer reading program with new desired results</td>
</tr>
</tbody>
</table>
A project:

1. Has an established objective or goal
2. Has a defined life span
3. Has a well defined team
4. Has a new or unique result to achieve
5. Has time, cost, and performance requirements
Project Management

Project management is the application of methods, skills, and tools to project activities to meet project requirements.
A project manager is the person responsible for leading a project from initiation to closing.
Let’s Get this Party Started!
"I decided to protect it, to care for it. I fed it good food, I worked with it. I played with it. But most of all, I gave it my attention."

-What Do You Do With An Idea? By Kobi Yamada
Planning: Where to begin?

- Make time to plan
- Include stakeholders & staff
- Make a project charter
Develop a Project Charter

- Project name, objectives statement (description, goals, requirements, out of scope, etc.), project team, schedule
- Iterative process: write a draft, share with team & stakeholders, rewrite, repeat until everyone agrees.
- Demonstrates agreement of everyone involved
- Important to have in large projects
Tackling the Nitty Gritty

- PM Knowledge Areas. Plan & manage the following:
  - Scope
  - Time
  - Cost
  - Human Resources
  - Communications
  - Risks
  - Procurements
  - Quality
Scope

Scope Statement

- Establishes baseline: What your project is and what it is not (out of scope)
- Helps prevent scope creep: the uncontrolled expansions to product or project scope without adjustments to time, cost, and resources
Time

Make a Schedule
- Let team members help!
- Work Breakdown Structure (WBS)
  - Tasks & Subtasks
- Dependencies
- Tasks take longer than expected!
- Keep it simple and accessible
Cost

Estimate Costs
- For many projects we begin with an amount
- Analyze activities, schedule, procurements, etc.
- Be accurate
- Decide who approves expenditures
Scope, Time, Cost
Human Resources

Team Members
- Who: Staff, outside experts, volunteers, patrons, friends/foundation members, etc.
- Consider: Availability, expertise, and experience, and personality
- Organization charts & plan for staff management

Stakeholders
- Establish stakeholders early
- Address concerns
Communications

- Decide early
- Consider team members & company culture
- Chat/messaging systems, email, meetings (ugh), shared documents
Procurements

- Internal v. external
- Start early! Send RFPs, locate/contact sellers, review contracts, compare prices, etc.
- Donations & volunteers: Free stuff can take longer
Risks

- Identify risks
- Include team members
- Plan risk response
  - Provide actionable results
Quality

- Decided early
- Continuously reviewed and analyzed
- **Golden Rule of Quality**: benefits of quality activities must outweigh the costs
Executing

- Team members begin their work
- Continuous reporting & updating
Monitoring & Controlling

● What?
  ○ Scope, schedule, cost, human resources, communications, risk, procurements, quality.

● Why?
  ○ Identify problems early
  ○ Ensure project is on task and within budget
  ○ Change requests

● Working project manager
Closing

- Closure Activities: Final product/service is delivered, etc.
- Performance Evaluations: Team members, PM self-assessment
- Project Retrospectives: What worked/what didn’t and create action plan
“Always plan for the fact that no plan ever goes according to plan.”
-Simon Sinek
Closing Thoughts
Project Management Methods

There are numerous project management methods. The method selected is driven by the project at hand and the culture of the library. The major differences in methods deal with who knows what, who has authority, and how concrete the end goal is.
Project Management Methods

- **Agile** - designed for highly flexible projects that require speed. Best suited for projects requiring less control and real-time communication with teams that are self motivated.

- **Waterfall** - most common method. It is sequential in nature. It is what Kelly outlined before. The increased control leads to less flexibility.

- **CPM or Critical Path Method** - is a step-by-step process for projects with interdependent activities. It contains a list of activities, a timeline for completion, milestones and deliverables. It highlights both critical and noncritical tasks.
Project Management Methods

- **CCPM or Critical Chain Project Management** - is similar to CPM but focuses on resource use instead of activities.

- **SCRUM** - is just fun to say. It is from the world of rugby. It is agile like and relies on iterations. It uses scrums (30-day sprints) to determine task priority. It makes heavy use of smaller teams. The project manager is called the SCRUM master.
Project Management Methods

**INTERNAL CRITERIA**

- **The Organization**
  - Organization maturity level and preparedness
  - Setup/hierarchy
  - Culture
  - Products/services
  - SWOT (strengths, weaknesses, opportunities, threats)
  - Level of flexibility/agility
  - Business drivers
  - Risks involved
  - Available resources
  - Leadership beliefs, value system, expectations and support
  - Industry, performance, competition, costs, productivity etc.

- **The Project**
  - Business and project requirements
  - The nature of the project itself
  - Size and complexity
  - Timelines
  - Stakeholder expectations
  - PMM effectiveness

- **People**
  - Experience
  - Training
  - Preparedness
  - Team location

- **Processes**
  - Internal processes/policies/practices

- **Technologies**
  - Available software and tools

**EXTERNAL CRITERIA**

- Vendors
- External stakeholder expectations and requirements
- PMBOK guidelines
Tools

Microsoft Project
Trello
Basecamp
Asana
Google Docs
Old fashion pen and paper
Website Launch

Notes:
Make sure the mocks satisfy all of the most important use cases.

Assignee: Stephanie
Projects: Website Launch

Building Phase:
- Greg: Create Home Page
- Greg: Create About Us Page
- Andrew: Set background photos
- Andrew: Embed videos

Testing Phase:
- Test new website in Chrome, Firefox, and Safari: Wednesday
- Test sign up flow: Wednesday
- Test videos: Wednesday

Release:
- Release to early adopters

View earlier activity
- Jackie: I've checked the new user use case and it looks good so far. Two more use cases to go.
  Apr 18 at 2:19pm
- Jackie assigned to Stephanie: Thursday
- Jackie: This looks great! Will the account controls disappear if you are not an admin?
  Thursday at 6:07pm
- Stephanie: Yes Only for Admins!
  Thursday at 8:22pm
PMI & PMP

**PMI** - The Project Management Institute is the major project management association. The credential managers through a variety of programs.

**PMP** - Is the Project Management Professional Certificate. There are approximately 750,000 certified PMPs.

- BA degree, 4,500 hours of PM experience, 35 contact hours of education, pass exam.
- <BA degree requires an additional 3,000 hours of experience.
Closing

Just keep swimming, just keep swimming
Questions?

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