Project Management as Bridge
Building Connections Between Library Strategic Goals and Direction, and Program/Project work

Minnesota Library Association Annual Conference, October 2018
Agenda

○ Overview
○ Scope & Development of Charter
○ Team Member Roles & Work Breakdown Structure
○ Communication
○ Organizing Meetings
○ Tracking Project Status
Overview

Structure of Today’s Workshop Session

Project Management Handbook:

https://z.umn.edu/nlshandbook

Why do this?
What is a Project?
Individual or collaborative work that requires planning to accomplish specific tasks. Project work effort is bounded by time and scope.
Scope & Development of Charters

Provide a single discussion point to move ideas up and down the organizational ladder

Take an ‘idea’ and apply consistent parameters and definitions

Acknowledge the questions that consistently come up in project development before discussion
Scope & Development of Charters

**UL Project Charter template**

- Background and Purpose
- Project Relevance to University Libraries
- Project Sponsor
- Project Team Members & Roles
- Project Scope
- Project Outcomes
- Project Timeline & Milestones
- Project Budget
- Risks & Related Issues
#1 - Instructions:

Think of a project you are currently doing or thinking about. How does your project fit with your library or department goals, or how do you see this project fitting into future work at your library?
Please Share!
Scope & Development of Charters - UMN Example

- Library Spaces on the Web Project
  - Libraries Spaces on the Web Mini-Charge
  - Meeting Libraries Strategic Goals - The Libraries' strong collections and expert staff fuel collaborations to benefit state and regional communities, and the Libraries integrates discipline-based knowledge, specialized expertise, and innovative learning spaces to advance learning and promote student success.
  - Online and Print representations of our Libraries - Users need to be able to find our resources consistently throughout the 12 libraries in the system and through the website.
Team Member Roles & Workbreakdown Structure

Assigned Roles Create Clarity

Assigned Roles Ensure All Jobs Get Done

Tracking Work is Easier

Breaking Work into Smaller Tasks Allows for Timeline & Milestone Planning

Breaking Work into Smaller Tasks Help Understand Next Steps
Team Member Roles & Workbreakdown Structure

Types of Roles on a Project Team

Work Breakdown Structure (WBS) breaks down work into smaller outcomes and tasks making it easier to prioritize outcomes, assign tasks to individuals or teams, and estimate the time and effort required for each task, and thus the time and effort required for the entire project. [Example here]
#2 - Instructions:

Using the project you just thought of, list out 3 sub-tasks for the work required along with identifying the staff or colleague who would be doing the tasks.
Please Share!
Team Member Roles & Workbreakdown Structure
- UMN Examples

- Roles: System evaluation example
- ILL Projects needing developer time/expertise:
  - 6 Ideas/Needs Identified: It was getting overwhelming!
  - Had a meeting with all stakeholders and players to identified:
    - Description of the problem included:
      - Effort needed; Personnel needed; Resources needed
Nothing worse than a poorly run meeting.

Clear understanding of purpose.

Accomplish more when efficient.

Attendees come prepared.

Action items and next steps are clear.
Organizing Meetings

Be prepared! Agendas go a long way.

Shared expectations: Behavior (e.g., listening more than speaking, etc.)

Organized and timely: Reasonable time for attendees to come prepared or respond.

Be respectful! Of ideas, time, expectations for due dates.

Clarity on follow-up: Action Items are the best.
#3 - Instructions:

Brainstorm 3-5 ground rules (either for attendees or for running) a good meeting.
Please Share!
Organizing Meetings - UMN Examples

Publishing Services Team

- Everyone adds to the agenda; chair of the committee ensures the agenda is up to date.
- Meetings alternate between 2 different libraries (10 min apart).
- Meeting minutes (primarily action items) are taken by same person each week.
Communication and Tracking Project Status

Ensures a consistent message regardless of internal/external needs

Provides transparency

Easily point to where the work is at a given time

Provides opportunities to recognize connections, missing steps, dependencies, etc.
Communication

Template: UL Draft Communications Plan

- Team Member
- Stakeholder
- Message Type
- Schedule
- Method/Tool
- Status
- Notes
Tracking Project Status

Template: Gantt Chart

- Time Segments
- Actions
- Milestones
- Planned/In Progress/Completed
#4 - Instructions:

Think of one milestone you have for your project and use the Gantt Chart template to think about the timeline and possible steps, or how you would communicate this milestone.
Please Share!
Tracking Project Status - UMN Examples

○ Leganto Trial and Potential Implementation Planning
  ○ Key milestones divide the project into meaningful sections
  ○ Tasks and subtasks, and sub-sub-tasks, ensure multiple stakeholders understand the current status
  ○ Assigned staff know how their work fits into the overall plan
Takeaway:

Go forth and project manage!
Questions?

Thank you!
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