

Project Management in Libraries: Class 1

Karen Calhoun, 10 July 2014
LIS 2971, University of Pittsburgh

Class 1 Outline

- Introductions
- Why projects and project management?
- What is a project?
- **Break**
- “Triple constraint” and project life cycle
- Where projects come from
- Course objectives
- Syllabus overview
- Preparing for next class

Introductions

Please share one experience that you've had with a project.

What is one thing you are hoping to take away from this class?

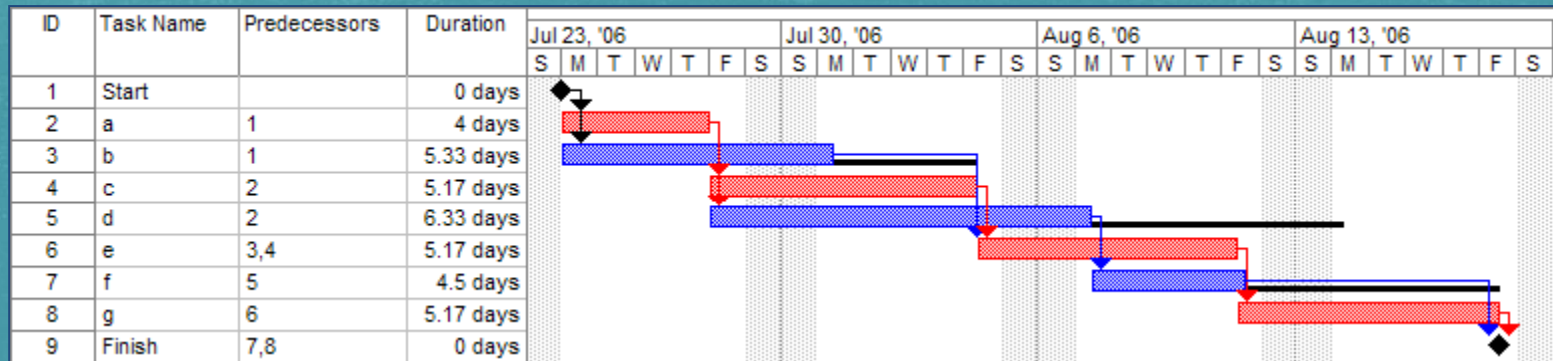


Image: Gantt chart by Dbsheajr. [CC-BY-SA 3.0](#)

WHY PROJECTS AND PROJECT MANAGEMENT?



Projects

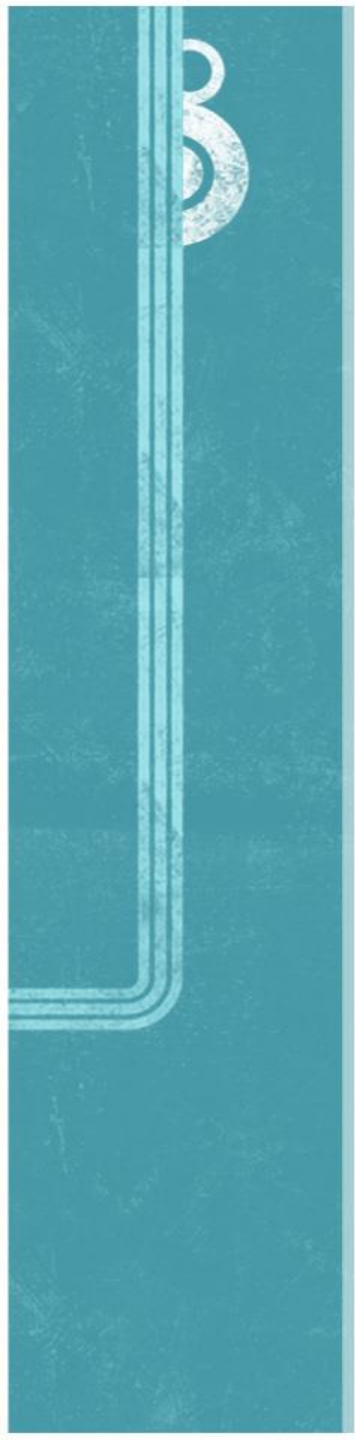
- Produce...



Change

- and
- Innovation

Images: Construction of Manhattan Bridge, 1909. Public domain.
Manhattan Bridge in 2007 by David Torres. [CC-BY-SA 3.0](#).



Why do organizations need innovations?

- All organizations rely on innovations (such as new products and services) to maintain viability in the communities they serve
- A significant percentage of use comes from newly introduced products and services
- Some high tech organizations expect a 100% turnover in their portfolio of products every five years
- **Libraries are not different in this regard**

Source: Adapted from Cooper, Robert G. 1993. *Winning at New Products*. Addison-Wesley. p. 9-10.



Some Barriers to Innovation

- Unclear strategic objectives or vision
- Organizational silos / lack of cooperation between departments
- Lack of skilled project management; too many projects
- Failure to address community needs
- Frequent changes in requirements
- Not enough time to do the work

Adapted from Himmelfarb, Philip A. 1992. *Survival of the Fittest: New Product Development during the 90's*. Englewood Cliffs, N.J: Prentice Hall.



Winners and Losers

- New products / services fail because
 1. Intended users don't need it
 - Inadequate understanding of community needs and preferences
 2. The product / service doesn't work
 - Problems or defects
 3. Intended users don't understand it
 - Ineffective communications (marketing)
 4. Intended users resist
 - Perceived risks (convenience, performance)
 - Product incompatible with user values or work practices
 - Bad timing

Adapted from Crawford, C. Merle. 1994. *New Products Management*. 4th ed. Irwin. (This book, now in its 10th ed., is a standard in the field.)

Libraries Need Innovators

“Organizations must be retooled, new skills must be learned or brought into the organization to ensure our viability.”

--Stephen Abram. Are libraries innovative enough? Presentation at OLA Superconference, Feb. 3, 2006.



WE NEED YOU



Why learn project management?

- Learn a structured approach to applying a defined body of knowledge, skills, tools and techniques to:
 - Create buy-in and consensus among those with a stake in the project outcome
 - Increase the likelihood that the target community will accept and adopt the result (new product, service, etc.)
 - Increase the likelihood that project requirements will be met
 - Reduce the time and cost needed to produce successful results
 - Avoid having to do things over again!

**WHAT IS (AND IS NOT) A PROJECT?
HOW DO I KNOW ONE WHEN I SEE
ONE?**



What is a project?

“A temporary endeavor undertaken to create a unique product, service, or result” – Project Management Institute – *PMBOK* section 1.2

- Temporary – project has a definite beginning and end
- Creates a unique product, service, or result
- Can involve single individuals, multiple individuals, single or multiple units, single or multiple organizations

Projects



Operations
(business
as usual)

Which articles describe projects?

FEATURE



These women are cycling across America to spread the word about pulmonary hypertension. See page 4.



UNIVERSITY TIMES

IN THIS ISSUE

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This year's Porter Prize lecturer has a wakeup call for all of us.....3



VOLUME 46 • NUMBER 16

APRIL 17, 2014

UNIVERSITY OF PITTSBURGH

Open enrollment runs April 23-May 14

Health insurance here will see a 3.5 percent rise in premium costs next year but no change in plan copayments, deductibles or co-insurance.

John Kozar, assistant vice chancellor for Human Resources,

says other changes include a 15 percent increase in vision premiums, a fresh opportunity to elect additional life insurance, a new web-based physician consultation service and the chance to roll over \$500 in health-care flexible

copayments to reduce the amount of increase," he adds, as was the case last year. This year, "what you pay at the doctor remains the same — and that's for all the doctor's services."

Panther Gold also is adding a

for the first time (\$1,800 for individuals and \$3,600 for families) as mandated by the Affordable Care Act. This is "a positive," Kozar says, potentially helping those with the greatest medical expenses.

cate, is seeing its deductible reduced to the level of the Panther Premier Plan — from \$750 to \$500 for individuals and from \$1,500 to \$1,000 for families using in-network services.

Pitt's UPMC Health Plan holders now will be able to see doctors online via the web-based UPMC AnywhereCare. It will be accessible starting July 1 on



What do projects create?



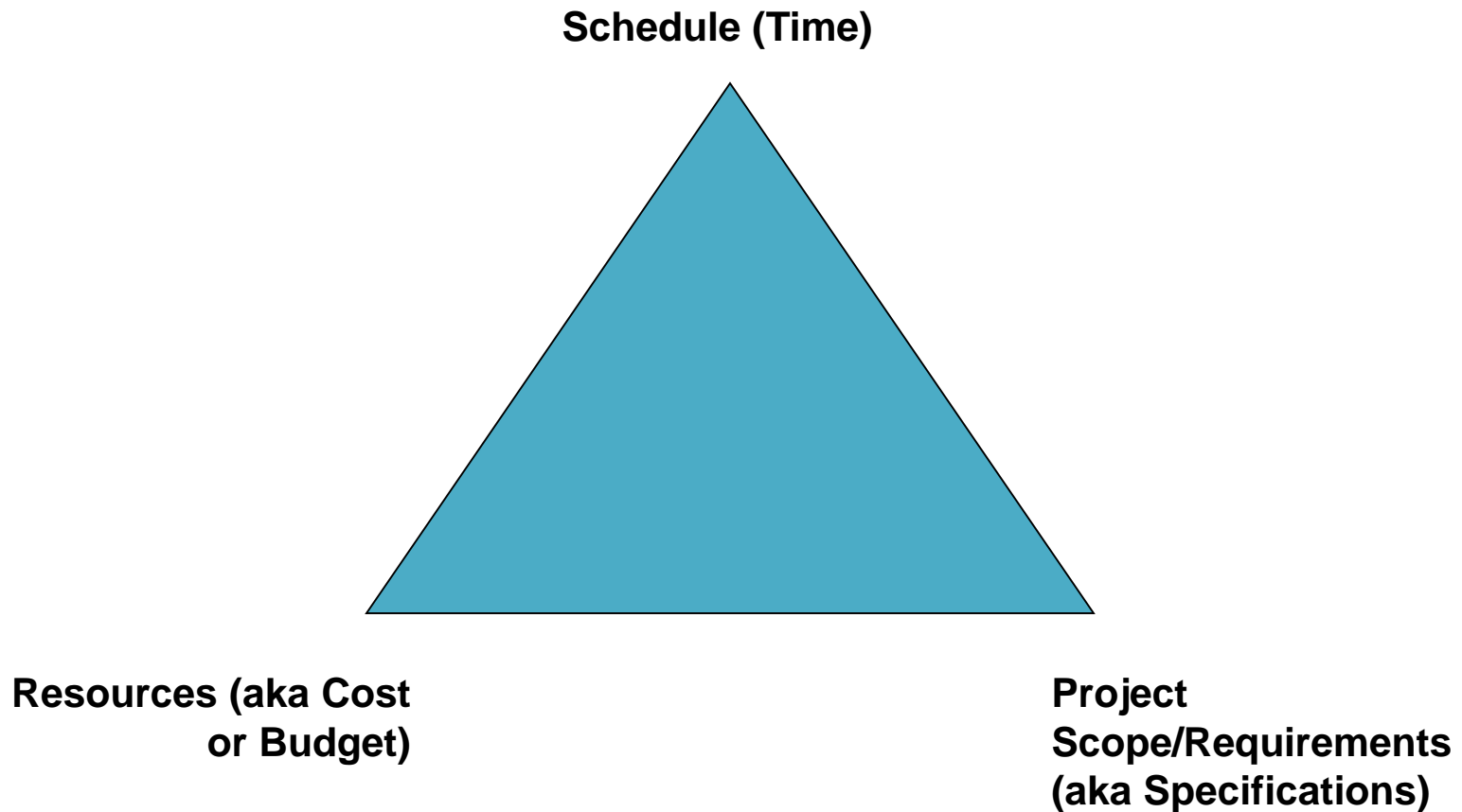
- Innovations, new products and services
- Changes (for example, reorganizations)
- New or modified systems
- New or modified processes, procedures, policies
- New knowledge or understanding
- New structures (like buildings, renovations, bridges, or monuments)
- Events
- More

Break: 15 Minutes



THE 'TRIPLE CONSTRAINT' AND THE PROJECT LIFE CYCLE

The Triple Constraint of Projects

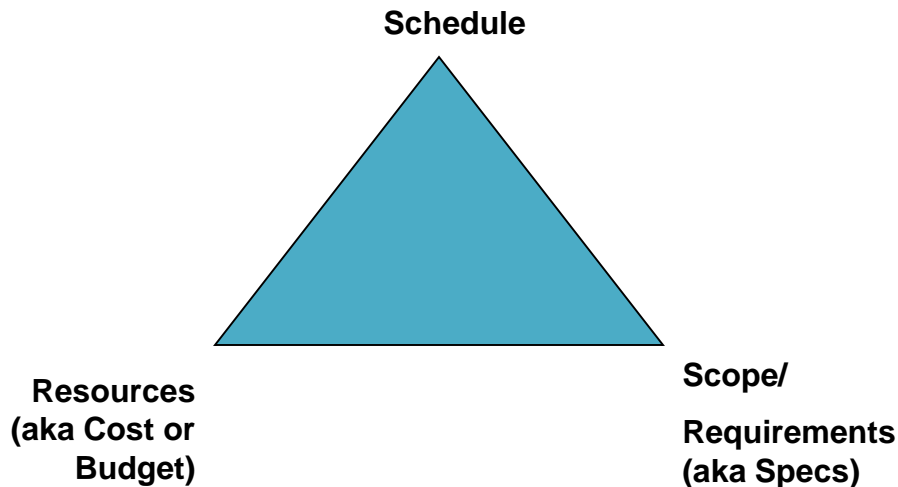




What is a successful project?

- Meets its objectives (satisfies scope or requirements)
 - Within allotted time
 - Within allocated resources
- While ...
 - Fulfilling needs of project sponsors and those performing the project
 - Maintaining harmony among project stakeholders
 - Producing meaningful, valuable results for target audience
- Sometimes a project is canceled prior to its completion
 - A project that ends in mid-course (when it is no longer needed) can still be 'successful'

Project Changes Are Inevitable: Understand the Impact!



**Do you remember
what this triangle is
called?**

IF:

- **SCHEDULE** is cut **THEN** must either get more **RESOURCES** or reduce **REQUIREMENTS** (or both)
- **SCOPE/REQUIREMENTS** increase **THEN** must either increase **SCHEDULE** or get more **RESOURCES** (or both)
- **RESOURCES** are cut **THEN** must either increase **SCHEDULE** or reduce **REQUIREMENTS** (or both)

...

Project Life Cycle: The Phases of Projects

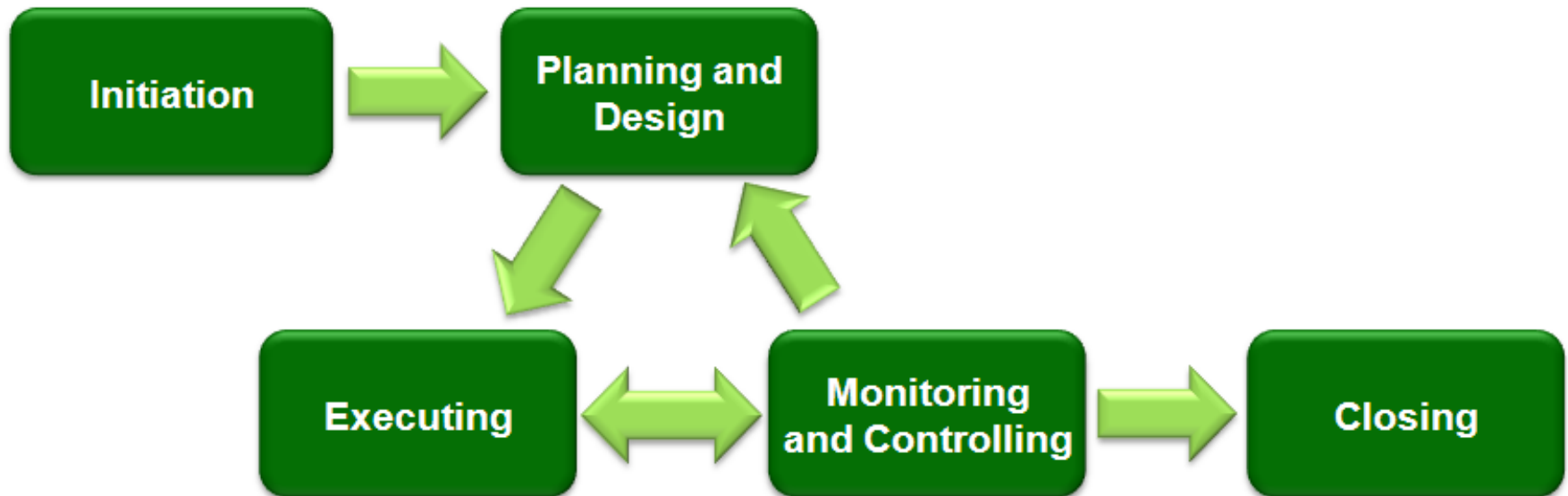


Image: Alphamu57 [CC-BY-SA 3.0](https://creativecommons.org/licenses/by-sa/3.0/)

WHERE PROJECTS COME FROM: STRATEGIC PLANNING (AND ELSEWHERE)

Where do projects come from?

Mission, vision and strategy

- **Mission**

- Who are we?
- What do we do?
- Why do we exist?

- **Vision**

- Where are we going?
- What are our aspirations?

- **Strategy**

- Where are we now?
- Where do we want to be?
- How will we get there?
- How will we measure success?

Google mission: Organize the world's information and make it universally accessible and useful.

Disney's one-time vision statement : To make people happy.

Twitter strategy: Become the first Web service to reach one billion users.

(As reported in 2009: <http://techcrunch.com/2009/07/16/twitters-internal-strategy-laid-bare-to-be-the-pulse-of-the-planet-2/>)

Where do projects come from?

Mission

Vision

Strategy

**Strategic
analysis**

**Strategic
options**

Strategic choices

Project 1

Project 2



Seriously though ...

Some other sources of projects

- The director or dean of the library
- Management (library administration)
- Board of directors
- The parent organization
- Donors
- Key stakeholders or influencers
- Vendors and sales representatives
- Consultants
- Librarians and staff
- One or more people in the library's user communities
- The library literature; conferences; other libraries
- Who or where else?

COURSE OBJECTIVES – WHAT'S IN THE COURSE, WHAT'S NOT

SCOPE: When you finish this course, you should be able to:

- Identify the phases of a project
- Propose and **initiate** a project
- Begin to **plan or design** a project
- Identify and work with key stakeholders
- Describe what a project manager does
- Identify types of teams

Project manager

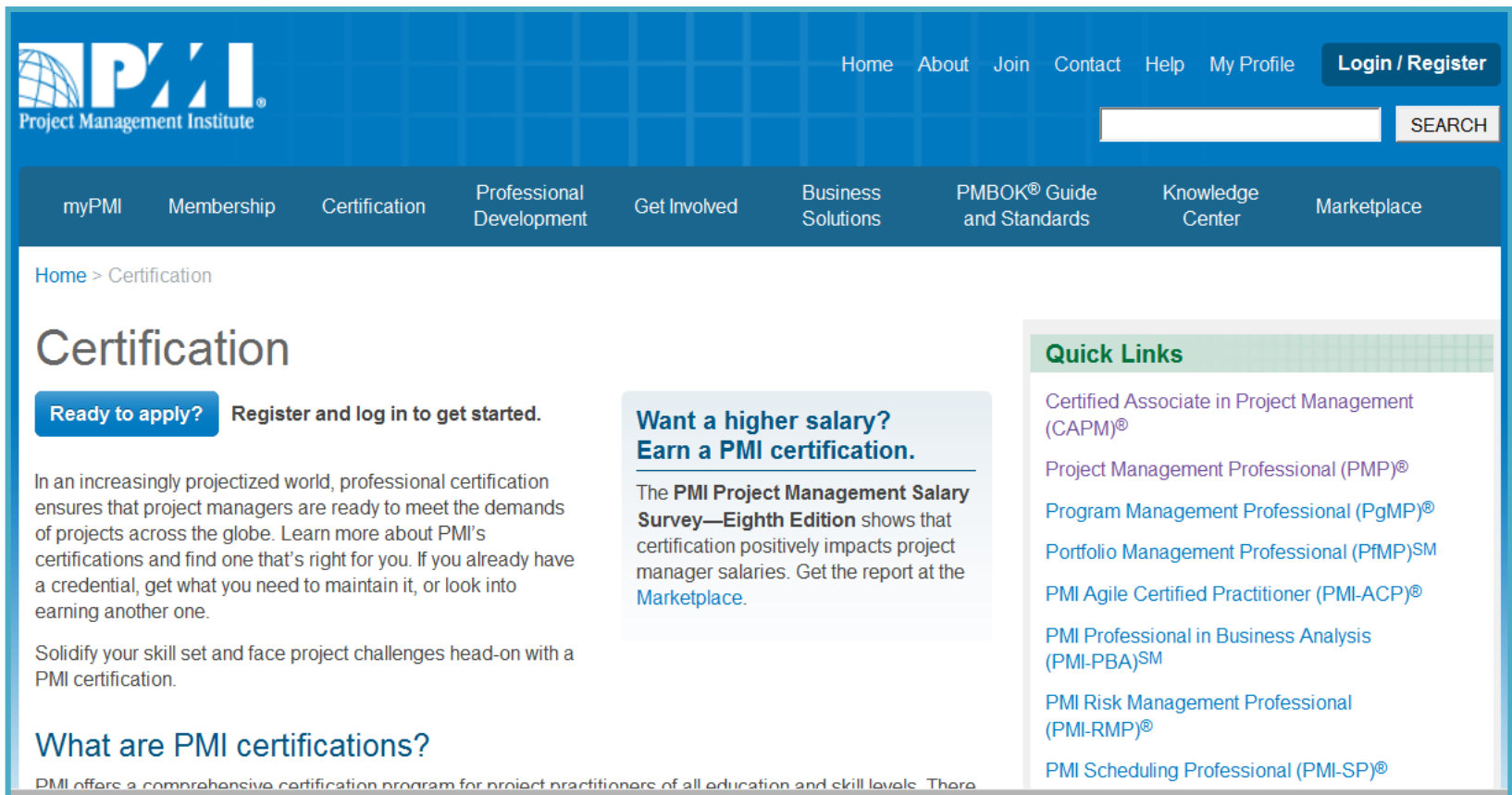


This course WON'T teach you how to ...

- **Execute, monitor and control** projects
- Produce or adjust time estimates or project schedules
- Allocate people to tasks and delegate work
- Account for dependencies
- Manage project risks
- **Close** projects
- Use project management software
 - E.g., Microsoft Project
- Lead organizational change



Seriously interested in becoming a project manager?



The screenshot shows the PMI website's 'Certification' page. At the top is the PMI logo and a navigation bar with links: Home, About, Join, Contact, Help, My Profile, and a Login/Register button. Below this is a search bar. A secondary navigation bar lists: myPMI, Membership, Certification, Professional Development, Get Involved, Business Solutions, PMBOK® Guide and Standards, Knowledge Center, and Marketplace. The main content area is titled 'Certification' and includes a 'Ready to apply?' button and a link to 'Register and log in to get started.' A paragraph explains the benefits of PMI certification in a projectized world. A sidebar titled 'Quick Links' lists various PMI certifications: CAPM®, PMP®, PgMP®, PfMP®SM, PMI-ACP®, PMI-PBA®SM, PMI-RMP®, and PMI-SP®. Another sidebar titled 'Want a higher salary? Earn a PMI certification.' features a link to a survey report.

PMI
Project Management Institute

Home About Join Contact Help My Profile [Login / Register](#)

SEARCH

myPMI Membership Certification Professional Development Get Involved Business Solutions PMBOK® Guide and Standards Knowledge Center Marketplace

Home > Certification

Certification

[Ready to apply?](#) [Register and log in to get started.](#)

In an increasingly projectized world, professional certification ensures that project managers are ready to meet the demands of projects across the globe. Learn more about PMI's certifications and find one that's right for you. If you already have a credential, get what you need to maintain it, or look into earning another one.

Solidify your skill set and face project challenges head-on with a PMI certification.

What are PMI certifications?

PMI offers a comprehensive certification program for project practitioners of all education and skill levels. There

Quick Links

- [Certified Associate in Project Management \(CAPM\)®](#)
- [Project Management Professional \(PMP\)®](#)
- [Program Management Professional \(PgMP\)®](#)
- [Portfolio Management Professional \(PfMP\)SM](#)
- [PMI Agile Certified Practitioner \(PMI-ACP\)®](#)
- [PMI Professional in Business Analysis \(PMI-PBA\)SM](#)
- [PMI Risk Management Professional \(PMI-RMP\)®](#)
- [PMI Scheduling Professional \(PMI-SP\)®](#)

Want a higher salary? Earn a PMI certification.

The **PMI Project Management Salary Survey—Eighth Edition** shows that certification positively impacts project manager salaries. Get the report at the [Marketplace](#).

<http://www.pmi.org/Certification.aspx>

SYLLABUS OVERVIEW



About this course

Project Management in Libraries LIS 2971: Special Topics Summer 2014 – 4 Week-3 Session July 7-August 2, 2014

Instructor Information

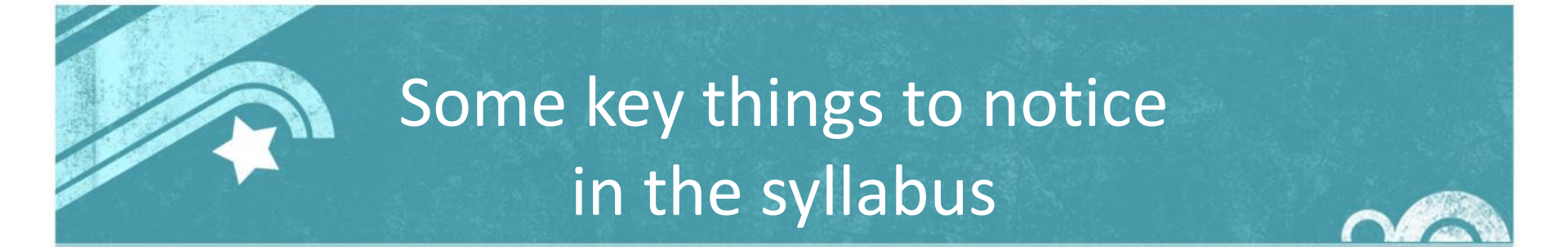
Instructor: Karen Calhoun
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Phone: 412-228-2474
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Office Hours: by appointment

TA: Jessica Benner
Office: 407 Information Sciences Bldg.
Phone: 304-268-7672
Email: jgb14@pitt.edu
Office Hours: In my office: Tuesdays from 4:00
– 6:00 pm & Thursdays from 12:00 – 1:00 pm
(immediately after the class session).

Course Information

Classes: Thursdays, July 10, 17, 24 & 31, 9:00 a.m. – 11:50 a.m.
404 Information Sciences Building

All course materials are available in Courseweb: <http://courseweb.pitt.edu> . Log in with your username and password and you should see the course “**2147_LIS_2971_SEC1300_SPECIAL TOPICS: PUBLIC SERVS**” in your course list. If you do not find the course in your list, please contact the instructor or TA.



Some key things to notice in the syllabus

- Course objectives (see also slide 28 of this presentation)
- No prior knowledge of project management required
- Collaboration with your classmates encouraged
- Where/how to get two key texts for the course:
 - PMBOK Guide* 2013
 - Jones and Murray. 2008. *Change, Strategy and Projects at Work*
 - Other assigned readings: links on Courseweb site for our class
- Schedule of topics and assignments for each class
- Grading
 - Quizzes
 - Worksheet proposing an idea for a project
 - Draft and completed project charter
 - Late work
 - Attendance (see statement on page 4 of syllabus)

Summary of Important Dates

When	What
July 10	<ul style="list-style-type: none">• Pre-class short assignment and blog post reading due at start of class
July 17	<ul style="list-style-type: none">• Quiz on Jones/Murray, Marrill/Lesher, PMBOK, Sierra and Glossary at start of class• Worksheet proposing an idea for a project due at start of class (bring two copies!)
July 24	<ul style="list-style-type: none">• Quiz on PMBOK, Starr, Minnesota handout at start of class• Initial draft of project charter (sections 1 to 4) due at start of class (bring two copies!)
July 31	<ul style="list-style-type: none">• Quiz on Jones/Murray, Horwath, WBS handout at start of class• Initial draft of project charter (sections 5 and 6) due at start of class (bring two copies!)
August 1	<ul style="list-style-type: none">• Completed project charters due via Courseweb no later than 11:59 pm

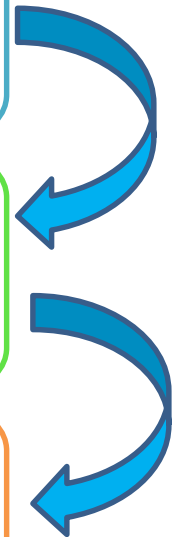
PREPARING FOR OUR NEXT CLASS

*Creative ideas
generate...*

Proposals

Projects

Change and
Innovation



Strategic option proposal template: HANDOUT

LIS2971: Project Management in Libraries

Strategic Option Proposal Template

Prepared by [name or names]

[Date]

[Revision date or dates]

Strategic option idea

[One-line statement of what is being proposed]

General description

[Brief explanation (2-3 sentences) of the new service, product, result, or enhancement]

Problem solved or perceived opportunity

[Concise rationale for the new service, product, result or enhancement. What problem does it solve? What opportunity does it grasp?]

Target audience or audiences and benefits

[Who will benefit from the new service, product, result or enhancement, and how?]

Strategic position

[State briefly how the new service, product, result or enhancement will advance your organization's current or future mission and strategy]

Some proposals that became projects: HANDOUT

A Few Small to Medium-Sized Projects in the University Library System, University of Pittsburgh
Compiled June 2014 by Karen Calhoun

Source: Documents of the ULS Leadership Program and personal files

Example	Purpose
Online user survey	Create and execute a survey of users of the Archive Service Center and various special collections at Pitt to establish priorities and identify new service opportunities.
Evaluation of pilot project	Evaluate the Twitter pilot project at the library of UP Greensburg and recommend next steps for both Greensburg and ULS libraries.
Data collection	Collect the data to support a publishable survey of North Korean research materials held in North American academic libraries.
Library research guide	Create a <u>LibGuide</u> on copyright, intellectual property, scholarly communication and publishing, in order to gather and point to now widely-scattered materials.
Redesign web pages	Redesign and improve the content and usefulness of ULS web pages describing library-provided instruction services.
Create wiki	Consolidate now scattered ULS technical services documentation; upload and organize it on a library-hosted internal web site (SharePoint).

Example:

Strategic option proposal: HANDOUT

Strategic Option Proposal #16

Strategic option idea

Investigate Boopsie Library App platform for potential purchase and distribution as ULS mobile app.

General description

Determine whether the Boopsie for Libraries app platform will provide increased value to ULS patrons by determining patron needs for mobile library access and whether the Boopsie platform meets those needs. If approved, work with Boopsie to create and distribute ULS mobile app.

Problem solved or perceived opportunity

In-house development of a mobile app can be costly but a native presence on mobile devices can deliver an enhanced experience and interaction with library services as well as offer an experience that takes advantage of users' chosen mobile device. By providing a custom app based on the library's needs, working with Boopsie or a similar app development platform will drastically reduce the resource demand for in-house app development. Boopsie provides a mobile solution for a fixed cost based on the size of the Library audience and the feature set the library would like to take advantage of.

Potential opportunities include:

- Location based information (hours, calendars etc.)
- Self-check from mobile device
- Barcode scan outside of library to check library holdings
- Overdrive, Courseweb, licensed database integration



Assignment to turn in at the
★ START of class next week (July 17)

- Using the “**strategic option proposal template**” on Courseweb, *prepare a proposal* for a project whose completion would produce positive change in your **personal or professional** life
- Choose carefully, as this proposal will provide the **basis for your project charter**
- Bring **two copies** to class next week (one to turn in, one to use in class)



Exercise: Individual and Group Work (25 minutes)

- **BY YOURSELF (10 minutes)**

- Glance through the syllabus – jot down any questions
- Look through the handouts (proposal template, sample proposal, some sample ULS projects)
- Jot down one or two ideas for a proposal
- The proposals should concern something important in your personal or professional life.

- **IN YOUR SMALL GROUP (15 minutes)**

- Compare notes on the syllabus – do you have any questions in your group?
- Compare notes on your ideas for project proposals
- Discuss the assignment to prepare a proposal and identify any questions that you have in your group
- Report out with your questions and any comments



For next week's class

- SEE SYLLABUS PAGE 7 FOR DETAILS – NOTICE WE WILL BEGIN WITH A QUIZ**

- ASSIGNMENTS TO COMPLETE BEFORE CLASS:**

- #1 Complete your worksheet proposing an idea for a project and turn it in at the start of class on July 17
- #2 Read: Jones, Roger, and Neil Murray. 2008. "So What's the Strategy?" In *Change, Strategy and Projects at Work*. Butterworth-Heinemann. Read pages 20-26 of this chapter.
- #3 Read: Marill, Jennifer L., and Marcella Leshner. 2007. "Mile High to Ground Level: Getting Projects Organized and Completed." *The Serials Librarian* 52 (3-4): 317–22.
- #4 Watch and study: Sierra, Tito. 2011. "The Project One-Pager: A Simple Tool for Collaboratively Defining Project Scope" presented at the Digital Library Federation Forum, November 2. <http://www.slideshare.net/tsierra/the-projectonepager>
- #5 Read: *A Guide to the Project Management Body of Knowledge: PMBOK Guide*. 2013. Project Management Institute. Read sections 1.7 and 1.8 (role and knowledge of the project manager).
- #6 Review and study: Handout "Glossary of selected terms in project management" (link on Courseweb)

Dive In!

Jessica and I look forward to working with you and getting to know you better.

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