Better Project Management in Libraries

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Each project has 5 project management phases it will go through

- **Initiate** – who is working on the project, what is the project for – get everyone on the same page before moving forward
- **Plan** – what will happen on the project – Work Breakdown structure is done Determine the timeline
- **Execute** – carry out the tasks on the project plan
- **Monitor** – while working on the tasks constantly monitor for potential missed tasks, potential risks – id’d or not, team issues – constantly reassess the completion of tasks compared to the timeline
- **Close** – Once the tasks are complete and the project is consider over – wrap up the loose ends, documentation, lessons learned – did well, not so well

A project should be no longer than a year
A project should have a definite start and end – not continue on forever.
What I explained on the previous slide was PMI – I have a PMP – Project Management Professional

At Hennepin County we loosely follow PMI – The county has forms and I take more liberties with those forms to simplify them

- Lean is more manufacturing PM
- Home grown is an organization will make up their own process
- Prince2 is in the UK

Agile was developed as a software development process, but is fairly quickly merging into all aspects of projects

- The intention behind Agile is to get the work done faster with fewer resources
- Moving away from the traditional Waterfall project management process where the entire project was determined with dates before starting any of it and, no dates could then move.
What does all of this mean?

Project Management is a way to...

- Organize, standardize, communicate, and estimate a project - in an effort to predict and understand when the project is off track much earlier than waiting until it’s almost done

- Understand what skill sets will be needed when
Every Project has Common Denominators

IT or Business
BEFORE PROJECT WORK STARTS!

PLAN
I must think about this!
Sign off doesn’t mean it will not change, but there is a common understanding when the project starts. If it changes, a discussion will need to take place and agreed upon what the changes are.

Scope

• What are you working on
• What are you not working on

• Prefer to have sponsor sign off on this before project starts to show you have support
If your answer is “I don’t know?”

Cancel or put the project on hold

What the scope is or what we are not working on -
Sponsor – Person who has the money for the project
Owner – Person who makes the decisions if needed on what the project will do
PM – Person pulling the team together and guiding the team through the process
BA – Person who researches and documents details of what needs to be done
Experts:
  • Developer
  • Operations staff
  • Line staff
  • Librarians
  • Others as the project needs
It’s a team, we all play a role!

Whether you are the lead dog or the wheel dog, know your role and ask if you don’t understand.

Photo by Francine Alt-Greene – Arrowhead Trail at Points Unknown.com
Constraint = A limitation or restriction

Work through these questions to determine the constraints and document them.

Things may change. Understand where things may change so it’s understood where the project may need to adjust.

Plan the Project Plan with these constraints in mind.
  • We won’t have the money until Jan 1?
  • There are 3 projects happening and the same person is key to all 3.
    • Which project has the priority?
Understand if there is a hard deadline – determined by management, events, need etc.

This could come out in the constraints as well.

Document the timeline and build the project plan with the timeline or constraint in mind.
To start with use post-its to write the top level chunks of work on as well as any known lower level work.

Gather the group that will know the tasks needed

Walk through the project with the group adding / removing / moving post-its until the group decides as a team that is what needs to be done.

For Waterfall methodology – use this to create the project plan

For Agile methodology – keep breaking the work down until you have work packages that can be completed in the 2-4 week work cycle your team has chosen. These packages then make up the backlog which has been prioritized by the manager and the team.
Work Breakdown Structure - WBS
Talking to people to make sure they understand the project, their role, where the project is at is a major portion of Project Management.

Understanding the role a person plays in the project as plays a big part to understand what is communicated to that person.

The role also will dictate what information each person should be communicating back to the team.

PM will ask project team to report on the progress of a task
Talk to the team:
  • How are they doing?
  • Is the work progressing as planned?
  • Are there any barriers to getting the work done?
  • Are there conflicts with other projects?
The act of documenting and verifying with the project team on the accuracy of the content is communicating and getting everyone on the same page.

The documents make sure all know what the original intent of the project is/was, but doesn’t mean it can’t change.

If changes are needed, they should be documented and agreed upon.
Keep it simple – Decision Log

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All happens before executing the project - Planning is the most important part

- Scope
- Roles
- Constraints
- Timeline
- Work to be completed
- Communication Plan
- Documentation

In reality, most of this is done, but the execution of the project starts before all are complete.

The charter may not be signed off on right away, but it’s known it will be.

Depending on the project – some prep work may need to start to even do the project – like order the servers?
How will following this planning process help you be successful?

- Know what you are working on to be able to report on it
- Know when you are in trouble before the trouble happens
- Be able to avert the issues because you have planned and know when something is not going well.
- Able to know when it's just not going to happen and can cancel the project
Example – Parallel Projects

- Projects need to be done at the same time:
  - Front end to the catalog
  - Moving applications from one language to another
- Extend the Go Live date
  - Using an estimation on the project plan of the other connecting project pieces well in advance of the Go Live date
  - BEFORE a date had been advertised
  - Instead of the day before Go Live, NOT DONE
How does this improve your work life?

- Less stress when coming up to a Go Live date
- Less overtime because work is planned
- Less tension at the end of a project due to not meeting the deadline
- Able to report to management accurately about the status of a project as the project progresses
If the methodology is changed regularly, it's hard to understand what to do next. Once staff are on board with a methodology, if it's changed, it causes confusion.

Meetings are meant to be productive. If they are not going to be productive, no decisions, not the right people, no defined outcome, then cancel it.

How to get there

• Methodology - pick one and stick with it, don't keep changing it
• Efficient Meetings
  • Always have an agenda
  • If there are no agenda items, cancel the meeting!
How to get there

- Document Decisions
- Document issues that need to be addressed
  - What is the issue?
  - What constraint does it cause?
  - Who is following up on it or who owns it?
  - Document the resolution with a date and details
A simple spreadsheet to follow up on.

Review this with the project team.

Allow others to add to it if they want, my experience is they do not. I as the PM follow up and put issues here as I hear about them.
How does Agile - Scrum fit in?

• **Backlog** - Break the project work down into small parts
  • Packages or chunks of work 2-4 weeks in duration
• **Sprint** - What working on currently
• **Celebrations** – Sprint Planning, Daily Stand Up, Iteration Review, Retrospective

Adjust your plan as needed - which may be regularly

Scrum is how the work is done – short intervals where a deliverable is achieved – could be a small deliverable

  The deliverable is shown to the stakeholders at the end of each Sprint

Backlog is a list of tasks or packages that need to be completed

Sprint is working on a task or package to complete it

Celebrations – key times to celebrate in Scrum -
Success is:

- Methodically looking at each project from the start to organize:
  - Project outcomes
  - Constraints
  - What is the Purpose!
- Each and every project will be more successful with planning up front

Note: Sometimes success is canceling a project due to lack of the above
Ride off in the sunset with a successful project!

Photo by Francine Alt-Greene – Hermitz, WI overlooking Lake Superior
Questions:

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