

**W**orking in libraries means working in very dynamic, exciting environments, as libraries face ever-changing technologies and communities. Such constant change typically means taking on more and more project work as we strive to provide current and relevant services to our patrons. This paper will discuss the basic concepts of project management, based on a presentation given by the author at the 2008 PNLA Conference in Post Falls, Idaho.

# Controlling Project Chaos: Project Management for Library Staff

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## Why Learn About Project Management?

As librarians deal more and more with upgrades, new services, and constant change the need to develop project management (PM) skills has become more important and recent literature highlights that need. In her article titled "Project Management Skills: A Literature Review and Content Analysis" published in C&RL in 2007, Jane Kinkus looks at the increasing number of job postings that require librarians to have project management knowledge, skills or experience, and she concludes "it is clear that project management in libraries is here to stay" (p. 361). In 2005, Winston and Hoffman wrote an article for the *Journal of Library Administration*, in which they discuss the importance of project management within libraries as well as the need to educate and train library staff in project management skills. Finally, in 2004, Schachter, in *Information Outlook*, writes "We don't often call ourselves project managers, but the fact that we do so much project management as part of our regular positions is increasingly being acknowledged and promoted as a core skill set of librarianship" (p. 10).

Recent literature aside, being able to manage projects successfully is the reality of our work as librarians. We are frequently implementing new services and redefining existing services for our patrons. We are constantly upgrading our library systems to provide the latest technologies for our users and we are updating our library spaces to give our community members an environment they find inviting, comfortable and engaging. With the frequent funding issues facing libraries, we are looking to build partnerships with other groups and organizations within our communities so we may continue to provide quality programs and materials for patrons. And, as we make all of these changes in our libraries, we are finding the need to develop new policies, procedures and training for our library staff and volunteers. All of these activities involve project work and the need for library staff to have PM knowledge and skills.

## What is a Project?

According to the Harvard Business School (2002), a project is "a unique set of activities meant to produce a defined outcome within an established time frame using a specific allocation of resources" (p. 4). Breaking down this definition, there are four key things to note: 1) projects involve change; 2) projects are outside the realm of day-to-day activities; 3) projects have start and end points; and 4) projects have limitations (e.g. time, money, resources).

First and foremost, projects are initiated to enact change. Projects can be market-driven, crisis-driven or change driven (Richman, 2002). Market-driven projects are a response to needs. For example, when patrons express their desire to have a meeting area in the library and the library reconfigures its existing space to meet this need the library is initiating a market-driven change. Another example of a market-driven project is when a library updates computer software in order to provide the latest technological capabilities for its patrons. A crisis-driven project involves developing a solution to a specific problem. For example, realizing that your volunteers are shelving materials incorrectly, the library develops a better training procedure. Finally, a change-driven project is one in which your goal is to make a process more efficient or effective. Updating the library catalog interface to make it more user-friendly for patrons and staff is an example of a change-driven project.

Secondly, project work should not be confused with the daily tasks and activities that we do in a library. Providing reference to library users is a daily activity and should not be considered project work; however, implementing a new reference service such as chat or instant messaging reference is project work. Once the new reference service is researched, implemented and evaluated, it then becomes part of the daily activities of the library, and the project of implementing the new reference service

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is concluded.

This leads to the third aspect of a project: it has a start and end point. Having a timeline that is accessible and understandable to all team members is essential for keeping projects on target and reaching the final goals and outcomes.

Finally, projects do have limitations. Libraries do not have unlimited staff, time, money or resources for projects, so how those limitations will effect the final outcome of the project must be considered.

### What is Project Management?

According to Richman (2002), "Project Management is a set of principles, methods and techniques that people use to effectively plan and control project work. The objective of PM is to optimize project cost, time and quality" (p. 4). Basically, PM is a systematic way of seeing a project through from initiation to completion, with four stages: 1) initiation; 2) planning; 3) execution and 4) closedown.

### Project Initiation

During the project initiation phase, the focus is on defining the project, choosing the project manager and identifying stakeholders. Clearly defining the project and its purpose is essential. The key question to ask is: what change do you want to enact within your library? It is also necessary to choose the project manager who will be responsible for overseeing the project (e.g. deadlines, budget, staffing, etc.). In addition to being responsible for the overall progress of the project, the project manager has the authority to make decisions and changes to the project.

Identifying the stakeholders of a project is also critical and it is important to think broadly when doing so, as stakeholders can include clients, customers and others who have an interest in or may be impacted by the project. The client is the individual who has requested the project; this may be the library director, departmental manager, or your patrons. The customers are the individuals who will benefit from the outcomes of the project, such as patrons or library staff. Occasionally, the customer and client can be the same. Other stakeholders can include library boards and administrators. Stakeholders can also be people who may not directly benefit from your project, but they still have a stake in the project because they provide funding to your library, such as taxpayers.

Remember, the purpose of taking on a project is to enact positive change within your library, but if you cannot clearly define why you should take on the project and if you cannot get buy-in from your client, customers and other stakeholders who will be affected (both directly and indirectly), you may want to rethink why you need to take on the project.

### Project Planning

In the next phase of PM, the focus is on planning the project. This is typically the phase that many people spend very little time on, and the lack of time spent on planning is what usually causes projects to become chaotic. It takes discipline to take the time to plan. Richman (2002) states:

The average organization spends only 5 percent of the total project effort on planning. More successful organization spend up to 45 percent. A good rule of thumb is to spend at least 25 percent of the project effort in concept and development and 75 percent in implementation and termination (pg. 50).

During the planning phase, it is important to create objectives, which are the measurable items you want to specifically accomplish in order to reach the goal and purpose of your project. A good method for writing objectives is to make sure they are SMART objectives. SMART is an acronym

for Specific, Measurable, Agreed-upon, Realistic and Time-bound (Richman, 2002). Next, you will need to develop a scope statement, which provides a detailed description of the project, and it should indicate the change and effect on the organization. This is a good place to integrate your organization's mission with the goals and objectives of the project. The scope statement acts as your road map. When projects begin to go awry (over budget, past deadlines, etc.) it's often due to scope creep. Thus, a clear scope statement can greatly reduce scope creep during implementation.

In addition to developing objectives and scope statement, a budget needs to be developed, including items such as staff time and labor, equipment needs and other costs related to the project. Other considerations for costs include how you plan to fund your project once it has been implemented and is part of your daily, ongoing activities. It is important to list available resources, such as staff knowledge and expertise, as well as equipment available, so it is apparent what costs will be incurred. List any limitations in resources, such as limited staff or equipment that will likely affect how quickly the project can be completed. Finally, create a timeline well as a work breakdown schedule (WBS) that lists specific tasks that need to be accomplished by individual team members as well as deadlines for completing those tasks.

During the planning phase, time should be spent considering possible challenges that may be faced during implementation, as some obstacles may require a change to the project. Also, spending the time to determine who will have the authority to make decisions and during the initiation and planning stages and then allowing that team member to deal with changes as they occur in the execution stage will help the project go more smoothly. Changes often will be necessary to complete the project, but remember to keep in mind the goals, objective, and scope of the project in order to mitigate scope creep.

Taking the time to create a detailed project plan can help for many reasons. One, it will help to monitor and control the project through the implementation stage. Two, it will allow for an evaluation of the success of the project during the closedown phase. Three, it provides documentation of the project that can be utilized for future projects. Four, having documentation that details how decisions were made during the project can help when the library is facing criticism from stakeholders or clients who question the purpose and necessity of the project. Lastly, a well-documented project plan provides historical information that can aid the organization's strategic planning for the future.

### Project Execution

The next phase in the PM process is execution (or implementation). During this phase, the goal is to monitor and control the objectives and tasks created in the planning phase. In order to gain some forward momentum and buy-in for the project, the project manager should have a kick off meeting at the beginning of the implementation stage. This helps to get project team members and stakeholders excited and motivated – the crucial keys to the success of any project. It also allows the project manager to convey important information such as the goals of the project, timeframe for completing the project, and methods for communicating and making decisions.

There are several things that need to happen during the execution phase: communication, data collection and change management. Early on in the project, the project manager should establish a communication method (in person meetings, e-mail, phone, etc.) and specify the frequency (e.g. daily, weekly, monthly) of communication that is expected

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from team members. Additionally, the project manager will also be responsible for communicating updates regarding the progress of the project to stakeholders and clients.

The project manager will need to decide what information is needed for data collection from the team. For example, if your library is installing new shelving for all library materials, the project manager will need frequent updates on what materials have been temporarily moved and where they are located as well as when the new shelving has been installed and the materials that have been moved back to their permanent location. Methods for collecting data include surveys, progress review meetings with team members, or the use of PM software to track the tasks. A spreadsheet is often helpful for tracking data.

There are many ways to develop a project plan and to keep track of projects that are going on in the library. Using a Word document and tracking progress with Excel spreadsheets are two simple methods. Having a web-based tool like a wiki can also be helpful in keeping track of the various aspects of a project. For large-scale projects, the library may want to consider using project management software. Examples of both proprietary and open-source software can be found at: [http://en.wikipedia.org/wiki/List\\_of\\_project\\_management\\_software](http://en.wikipedia.org/wiki/List_of_project_management_software)

Remember that changes will occur in any project, so part of the job of the project manager is to manage changes in accordance with the goals, objectives and scope of the project. Again, providing the project manager with the authority to make appropriate changes facilitates timely execution of the project.

Finally, stakeholders need to be kept in the loop concerning progress and changes during the execution of the project.

### Project Closedown

As stated at the beginning of this article, projects have end points. During the closedown phase of a project, the focus should be on evaluating the tasks and work done and determining if the project has met the initial objectives. Evaluation should also review areas that went beyond the scope statement with suggestions for how to mitigate those issues for future projects, or at least justification for why it was necessary to go beyond the original scope of the project. Also, as part of the closedown phase, an outcome report should be prepared and given to the client, customers and stakeholders, so they know the project is completed. Finally, the project manager should make a point of having a final team meeting to disassemble and thank the team members for their work and efforts in making the project a success.

### Final comments

Libraries are active, vibrant places due, in part, to the projects taken on by librarians that enact changes within their organizations that make their libraries more engaging and relevant to patrons. However, keeping track of projects and their progress can be difficult because of the many variables and individuals involved, which can lead to project chaos. Having knowledge of project management concepts can help greatly in successfully managing these inevitable library projects.

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