Library Projects Using Agile or Traditional Project Management:

Less stress and more success

#Háafell

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You can't learn to Catalogue in 15 minutes

And

You can't learn Project Management in 15 minutes

What is a Project?

What is a project?

- Working towards a goal
- Coordinated tasks
- Needs resources
- Has timelines

- It is not ongoing work

Why do they fail?

- Poor communication between groups

- Fuzzy expectations

- Not enough resources

- Working on too many other projects

- Unclear responsibilities and authority

- We want to do the fun stuff first

Two households,
Both alike in dignity

Traditional

- Designed for $1M+ infrastructure
- Plan in advance
- Pre-organized procurement & staffing
- Set budget
- See Project Management Institute (PMI)

Agile

- Designed for software projects
- Roughly organized
- Uses a stable group of workers
- Organized around Sprints lasting around a month
- See Agile Manifesto

Typical Library Projects

Traditional

- Renovation / Move
- New Service
- ILS change
- Inventory

Agile

- New website
- Outreach programming
- Workflow overhaul
- SpringShare stuff
- New Social Media Channel
- Re-Open library after Covid lockdown

Ground Your Work

Charter / Scope

Charter

- Key document in project planning phase

- Provides a high-level "big picture" for the project

- Describes WHAT the project is about

- Aligns the project's goals to the organizations' goals

- About 2- 3 pages

- Authorizes the project manager to begin work

- Scope is HOW you will do it

- Break it into 3-5 big work packages
  - System
  - People
  - Items
  - Space

1. Project Overview

The Scandinavian Cultural Centre (SCC) serves as a community centre for the following Nordic cultural groups: Finland, Sweden, Denmark, Norway, and Iceland. These groups represent members throughout the lower mainland, British Columbia, and western Canada. Each group has their own room for their members which include furniture, basic office supplies, and cultural pieces. The greatest cultural artifacts for each group are their libraries with titles in both English and their native language. While the SCC would like to use the library to build outreach with members, there is no consistent structure to the collections for collection maintenance, circulation, or Integrated Library System (ILS). In order to reach out to members outside of the lower mainland, a committee has formed to create an Online Public Catalogue (OPAC) and to standardize the various catalogues.

2. Business Needs/Justification

To share the collection with all members, not just those in the lower mainland. The project must help promote Nordic heritage and community to all those seeking to learn more.

The libraries contain standard material types like books, CDs, and DVDs. Some libraries are well catalogued with a standard card catalog while others are uncatalogued with both English and native languages interfiled. The project will standardize the collection's cataloging and allow titles to be found easily. The current libraries are full and require additional space or deselection of titles.

3. Project Objectives

This project will meet the following objectives:

- To create a standard Online Public Access Catalogue (OPAC) to allow community members to independently locate materials by their bibliographic descriptions.
- To organize all bibliographic material holdings within the SCC by language.
- Allow patrons to use self-regulating checkout system
- To standardize cataloging practices for bibliographic description and item location.
- Allow the collection to grow by 20% over the next five years.

4. Project Assumptions

In order to identify and estimate the required tasks and timing for the project, certain assumptions and premises were made. Based on the current knowledge, the project assumptions are listed below. If an assumption is invalidated at a later date, then the activities and estimates in the project plan should be adjusted accordingly.
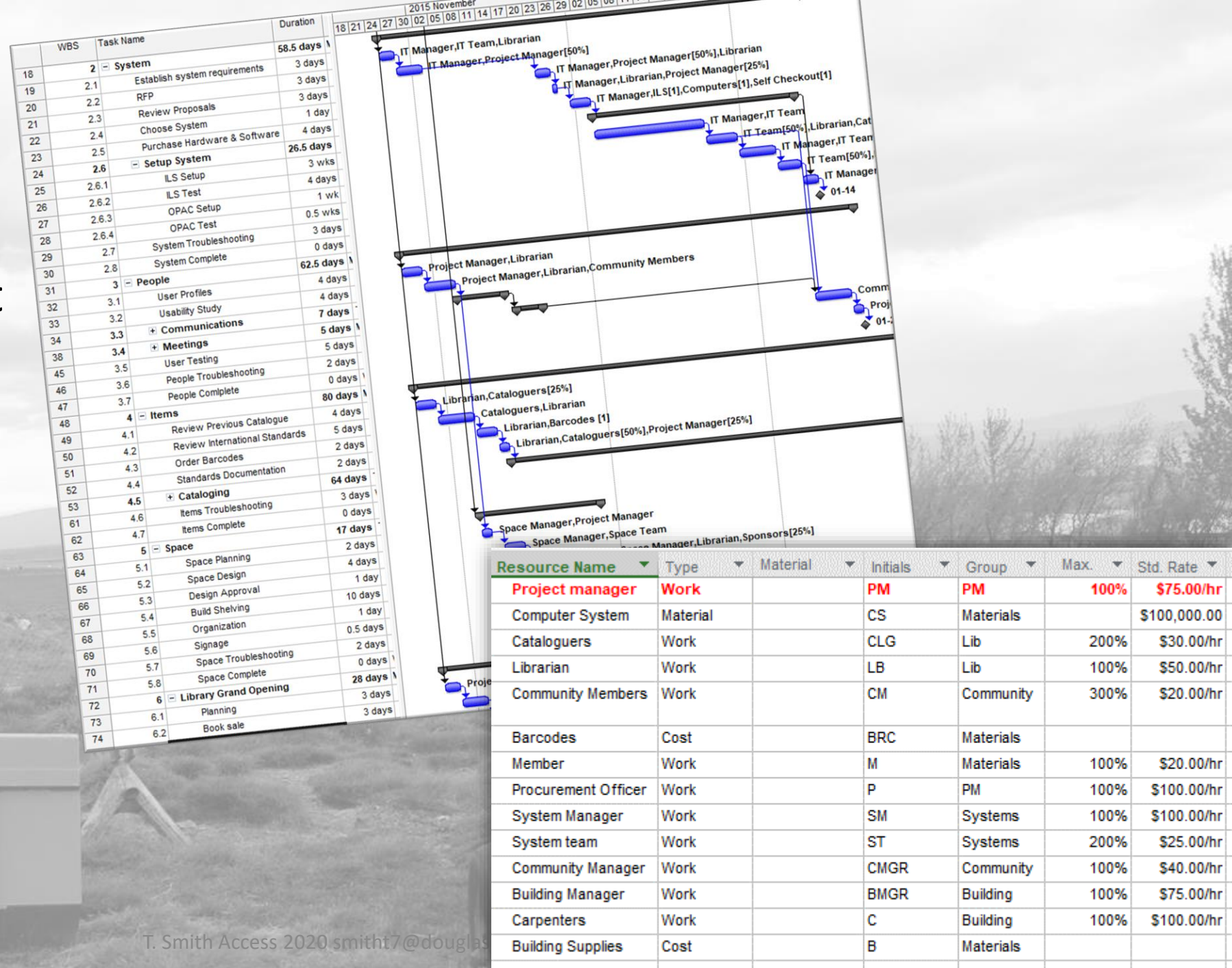
- Funding for the OPAC can be shared equally amongst all members
- Sufficient room will be found for an increased collection
- All groups can share their memberships for a single source for patron records.
- Donors will be able to provide additional titles.
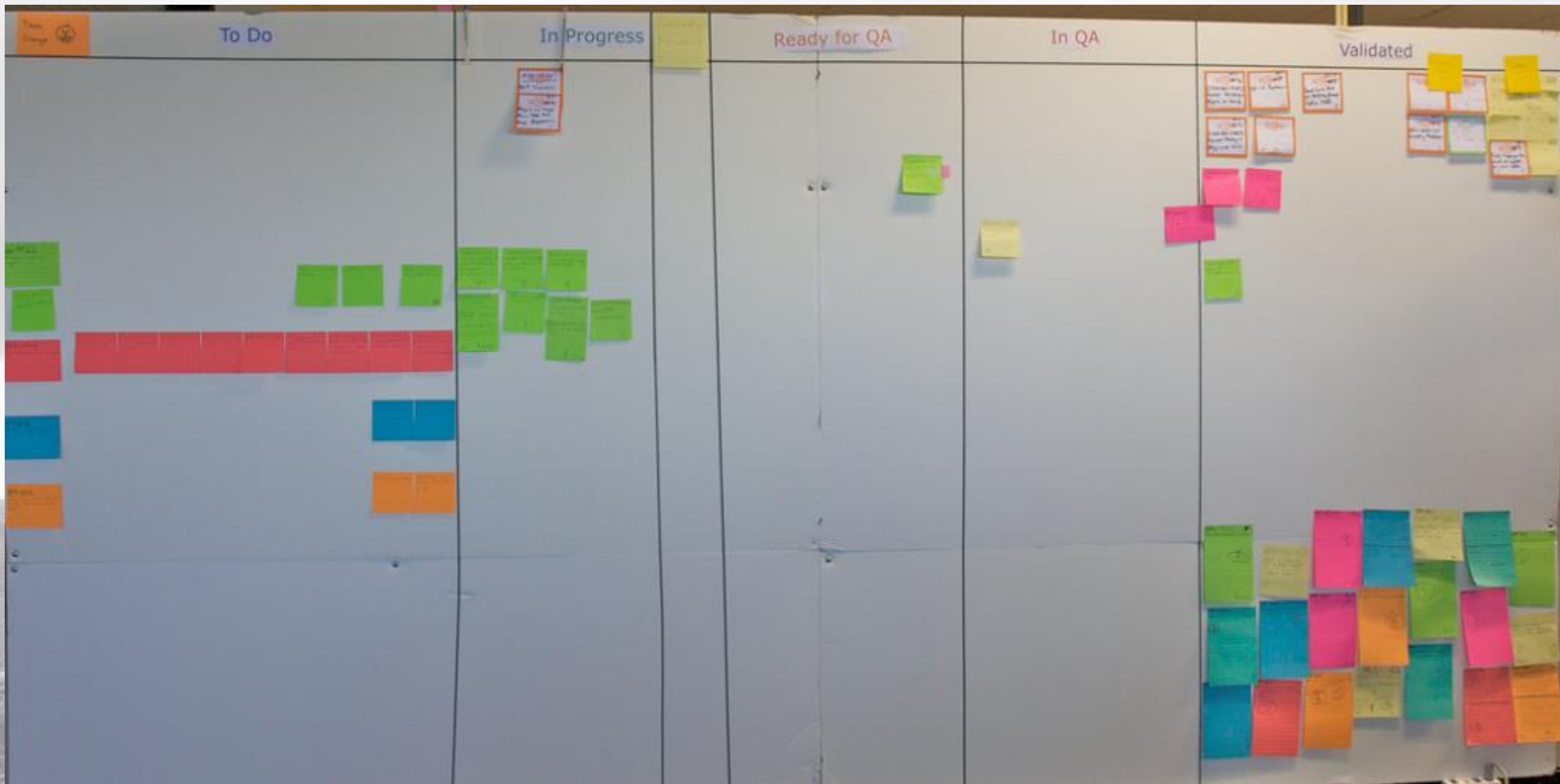
Pick your Tools

Traditional

- Microsoft Project
- Gantt Project
- Project Libre

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Don't go Chasing waterfalls
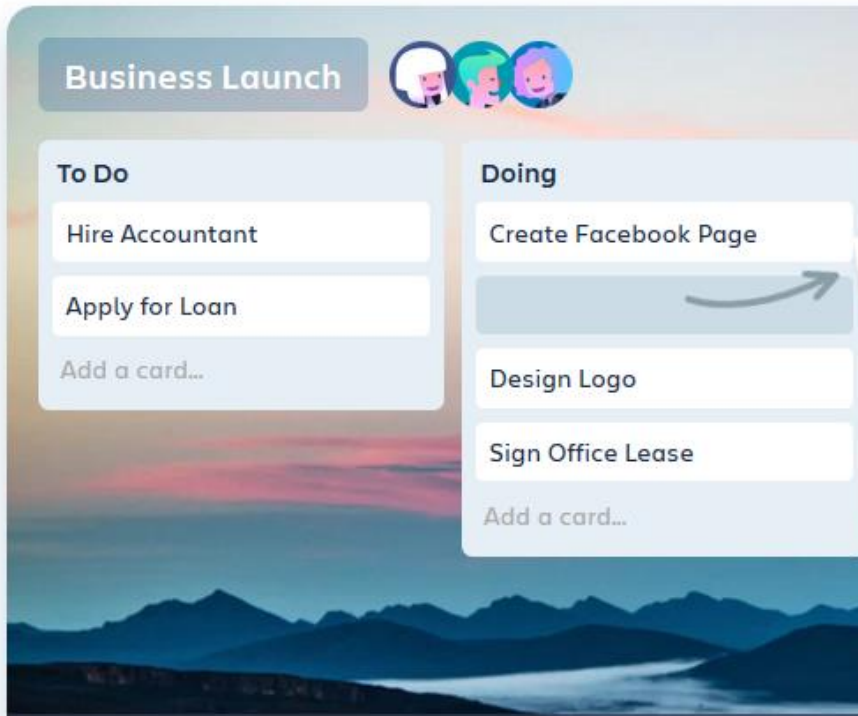
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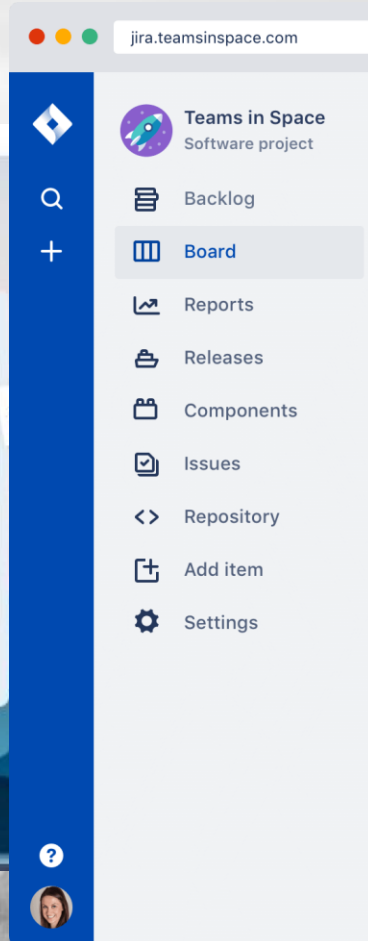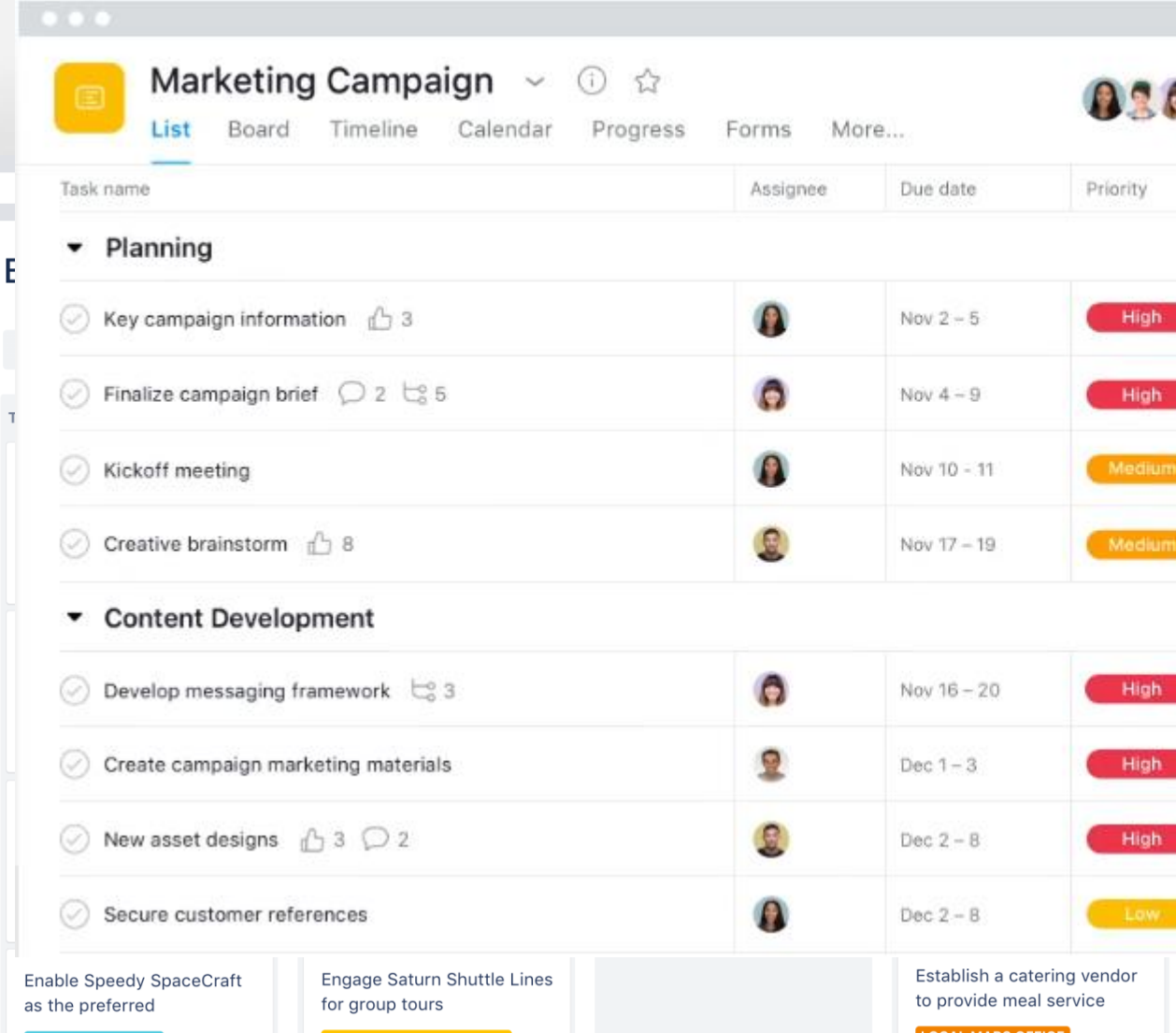
Agile

Asana

Jira

Trello

Marketing Campaign

List Board Timeline Calendar Progress Forms More...

Task name		Assignee	Due date	Priority
▼ **Planning**				
Key campaign information 👍 3		🧑	Nov 2 – 5	High
Finalize campaign brief 💬 2 ⛓ 5		🧑	Nov 4 – 9	High
Kickoff meeting		🧑	Nov 10 - 11	Medium
Creative brainstorm 👍 8		🧑	Nov 17 – 19	Medium
▼ **Content Development**				
Develop messaging framework ⛓ 3		🧑	Nov 16 – 20	High
Create campaign marketing materials		🧑	Dec 1 – 3	High
New asset designs 👍 3 💬 2		🧑	Dec 2 – 8	High
Secure customer references		🧑	Dec 2 – 8	Low

Teams in Space
Software project

Backlog
Board
Reports
Releases
Components
Issues
Repository
Add item
Settings

jira.teamsinspace.com

Business Launch

To Do	Doing
Hire Accountant	Create Facebook Page
Apply for Loan	
Add a card...	Design Logo
	Sign Office Lease
	Add a card...

Enable Speedy SpaceCraft as the preferred

Engage Saturn Shuttle Lines for group tours

Establish a catering vendor to provide meal service

Communication

- Slack
- Microsoft Teams (Planner)
- Basecamp

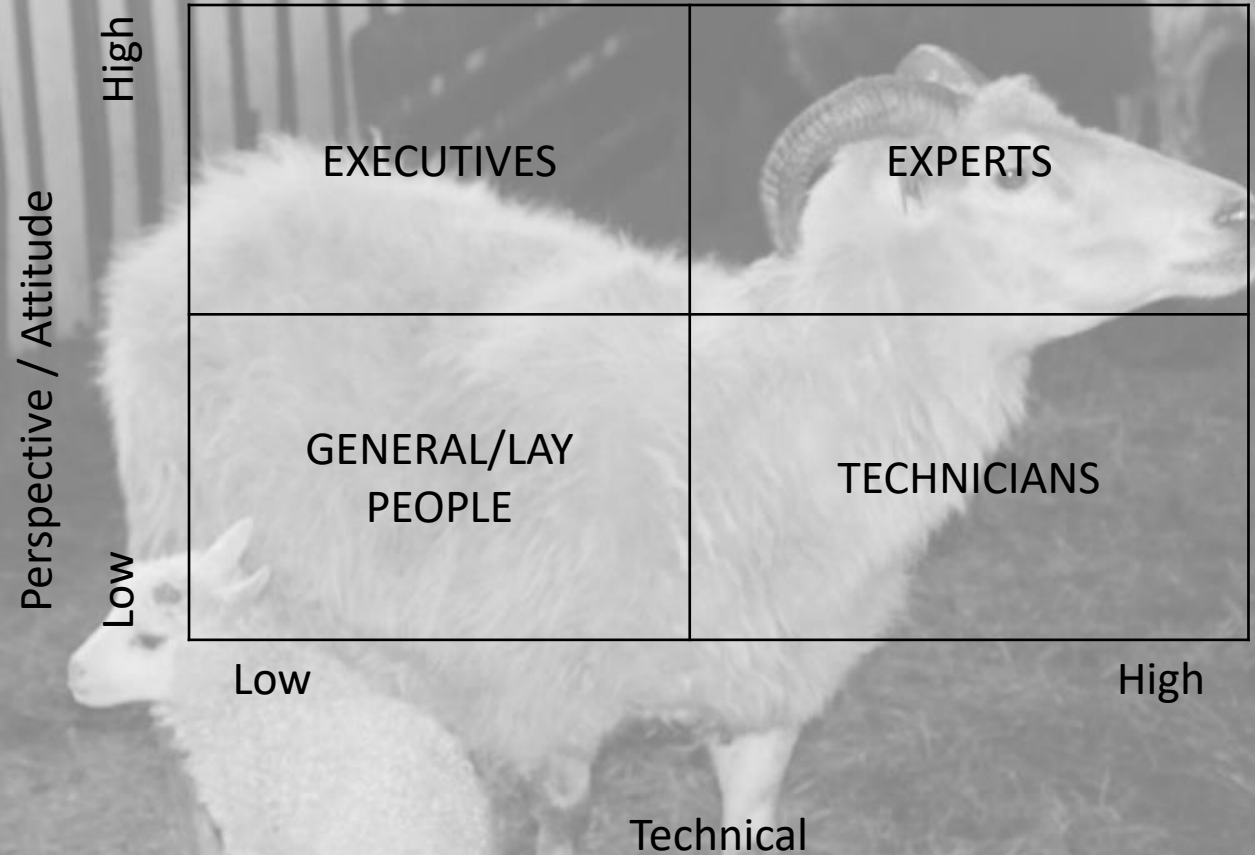# Communicate, Communicate, Communicate

Communication channels

n(n-1)/2

- n = number of stakeholders
- With 3, you have 3 channels
- With 5 TS folks, you have 10 channels
- With 12 Librarians, you have 66 channels

Audience

- EXPERTS – formally qualified and prefer sufficient information to understand the detailed status

- EXECUTIVES – decision makers who prefer "bottom line" information and conclusions

- TECHNICIANS – varying qualifications/skills but prefer to have more technical information

- GENERAL/LAY PEOPLE– non-specific and non-technical who want general info

	Low — Technical — High
High (Perspective / Attitude)	EXECUTIVES / EXPERTS
Low	GENERAL/LAY PEOPLE / TECHNICIANS

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RACI Chart

- Responsible
- Accountable
- Consulted

RACI ANALYSIS	Project Manager	Sponsors	Community Members	IT Manager	IT Team	Librarian	Cataloguers	Space Manager
Project Management				C		C		C
Initiate Project	R	A		R		R		R
Project Approved	I	A		R		I		R
Plan Project	A			R	C	R	C	R
Project Kickoff	R	A	I	R		R		R
Monitor and Control Project	A	I		R		R		R
Close project	R	A						
System				A	R	R		
Establish system requirements	I			A	R	I		
RFP	C	I		A	C	I		
Review Proposals	R	R		C	R	C		
Choose System	A			R	R	C		
Purchase Hardware & Software	A			A	R	I		
...system	I	I		A		C		I
...Troubleshooting	C				R	R		
...Complete	C		C		R	R		

	Librarian	Cataloguers	Space Manager
Items			
Review Previous Catalogue	A	R	
Review International Standards	A	R	
Order Barcodes	A	R	
Standards Documentation	A	R	
Cataloging	A	R	
Items Troubleshooting	A	R	
Items Complete	A	R	
Space			
Space Planning			R
Space Design	C		A
Design Approval	C		R
Build Shelving			A
Organization	R		A
Signage			A
Space Troubleshooting	C		A
Space Complete	C		A

Organizing Your Work

Scrum in 4 steps

1. The team and the project sponsors create a prioritized list of all the things the team needs to do. This can be a list of tasks or a list of features. This is known as the product backlog.

2. Each month, the team pulls off the top section of the list, which they estimate to be one month's worth of work. They expand it to a detailed task list, called the sprint backlog. The team promises to demo or deliver the results to the sponsors at the end of the month.

From: Alistair Cockburn, Agile Software Development: The Cooperative Game, 2nd Edition (Boston: Addison Wesley, 2006).

3. Each day, the team meets face-to-face for five to ten minutes to update each other on their status and on any roadblocks that are slowing them down. This is called the daily standup meeting.

4. One particular person is designated the Scrum Master. It is this person's assignment to remove, or get someone to remove, whatever roadblocks the team mentions in the standup meeting.

   The Scrum Master acts as leader, coach, and shepherd to guide the team through the project.

From: Alistair Cockburn, Agile Software Development: The Cooperative Game, 2nd Edition (Boston: Addison Wesley, 2006).

WBS

- Deliverables
  - Tasks
  - Estimate time
  - Estimate resources
  - Link together in sequence

10/22/2020

	WBS	Task Name	Duration
			58.5 days
18	2	⊟ System	3 days
19	2.1	Establish system requirements	3 days
20	2.2	RFP	3 days
21	2.3	Review Proposals	1 day
22	2.4	Choose System	4 days
23	2.5	Purchase Hardware & Software	26.5 days
24	2.6	⊟ Setup System	3 wks
25	2.6.1	ILS Setup	4 days
26	2.6.2	ILS Test	1 wk
27	2.6.3	OPAC Setup	0.5 wks
28	2.6.4	OPAC Test	3 days
29	2.7	System Troubleshooting	0 days
30	2.8	System Complete	62.5 days
31	3	⊟ People	4 days
32	3.1	User Profiles	4 days
33	3.2	Usability Study	7 days
34	3.3	⊞ Communications	5 days
38	3.4	⊞ Meetings	5 days
45	3.5	User Testing	2 days
46	3.6	People Troubleshooting	0 days
47	3.7	People Comlpete	80 days
48	4	⊟ Items	4 days
49	4.1	Review Previous Catalogue	5 days
50	4.2	Review International Standards	2 days
51	4.3	Order Barcodes	2 days
52	4.4	Standards Documentation	64 days
53	4.5	⊞ Cataloging	3 days
61	4.6	Items Troubleshooting	0 days
62	4.7	Items Complete	17 days
63	5	⊟ Space	2 days
64	5.1	Space Planning	4 days
65	5.2	Space Design	1 day
66	5.3	Design Approval	10 days
67	5.4	Build Shelving	1 day
68	5.5	Organization	0.5 days
69	5.6	Signage	2 days
70	5.7	Space Troubleshooting	0 days
71	5.8	Space Complete	28 days

2015 November

2015 December

IT Manager,IT Team,Librarian
IT Manager,Project Manager[50%]
IT Manager,Project Manager[50%],Librarian
IT Manager,Librarian,Project Manager[25%]
IT Manager,ILS[1],Computers[1],Self Checkout[1]
IT Manager,IT Team
IT Team[50%],Librarian,Cat
IT Manager,IT Team
IT Team[50%],
IT Manager
01-14

Project Manager,Librarian
Project Manager,Librarian,Community Members
Comm
Proj
01-1

Librarian,Cataloguers[25%]
Cataloguers,Librarian
Librarian,Barcodes [1]
Librarian,Cataloguers[50%],Project Manager[25%]

Space Manager,Project Manager
Space Manager,Space Team
Project Manager,Space Manager,Librarian,Sponsors[25%]
Carpenter,Space Team
Space Team,Librarian,Space Manager
Carpenter,Lumber,Space Team
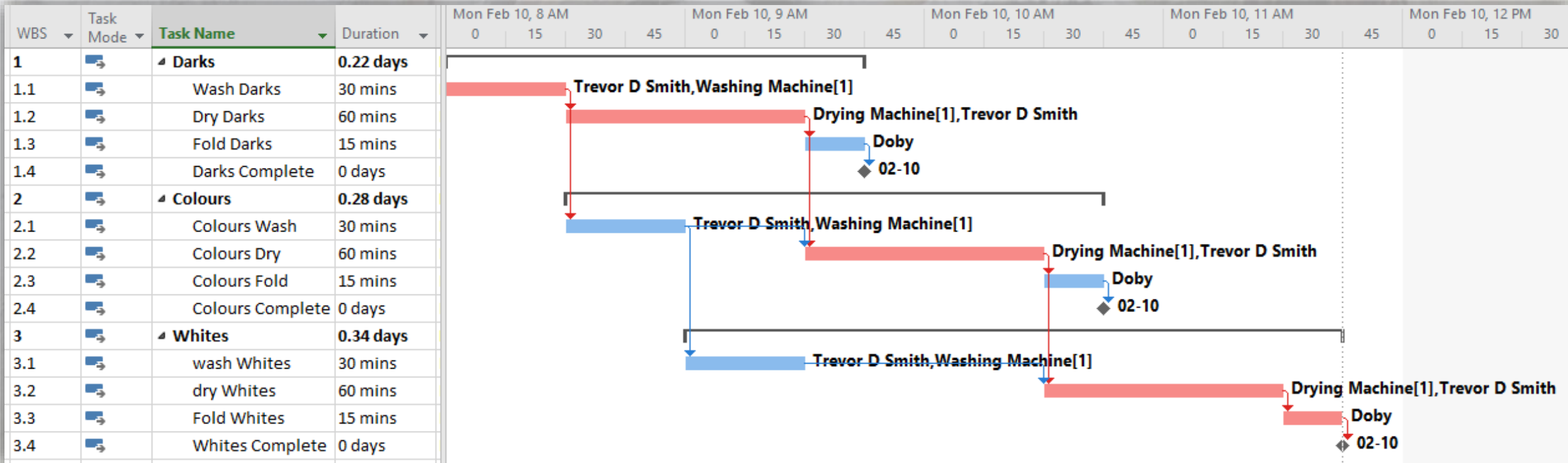Space Manager
11-18

Project Manager,Events Manager

Critical Path – Because nobody is secretly doing laundry at a conference…

- The critical path is the shortest route through your schedule where there is no float.

- Laundry
  - 3 loads – Whites, Darks, Bright
  - 3 steps – Wash, Dry, Fold
  - 3 times – 30m, 60m, 15m

Critical Path

WBS	Task Mode	Task Name	Duration
1		⊿ **Darks**	**0.22 days**
1.1		Wash Darks	30 mins
1.2		Dry Darks	60 mins
1.3		Fold Darks	15 mins
1.4		Darks Complete	0 days
2		⊿ **Colours**	**0.28 days**
2.1		Colours Wash	30 mins
2.2		Colours Dry	60 mins
2.3		Colours Fold	15 mins
2.4		Colours Complete	0 days
3		⊿ **Whites**	**0.34 days**
3.1		wash Whites	30 mins
3.2		dry Whites	60 mins
3.3		Fold Whites	15 mins
3.4		Whites Complete	0 days

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Program Evaluation and Review Technique (PERT)

- If you don't know how long it will take, try PERT
- Take values for the pessimistic, optimistic, and most likely guesses

$$\frac{\text{Pessimistic} + \text{Optimistic} + 4 \text{ (Most Likely)}}{6}$$

"We have to update the proxy for all the databases. How long will it take?"

"Probably 4 days, maybe 2 days if we're lucky, but maybe 2 weeks if things go bad."
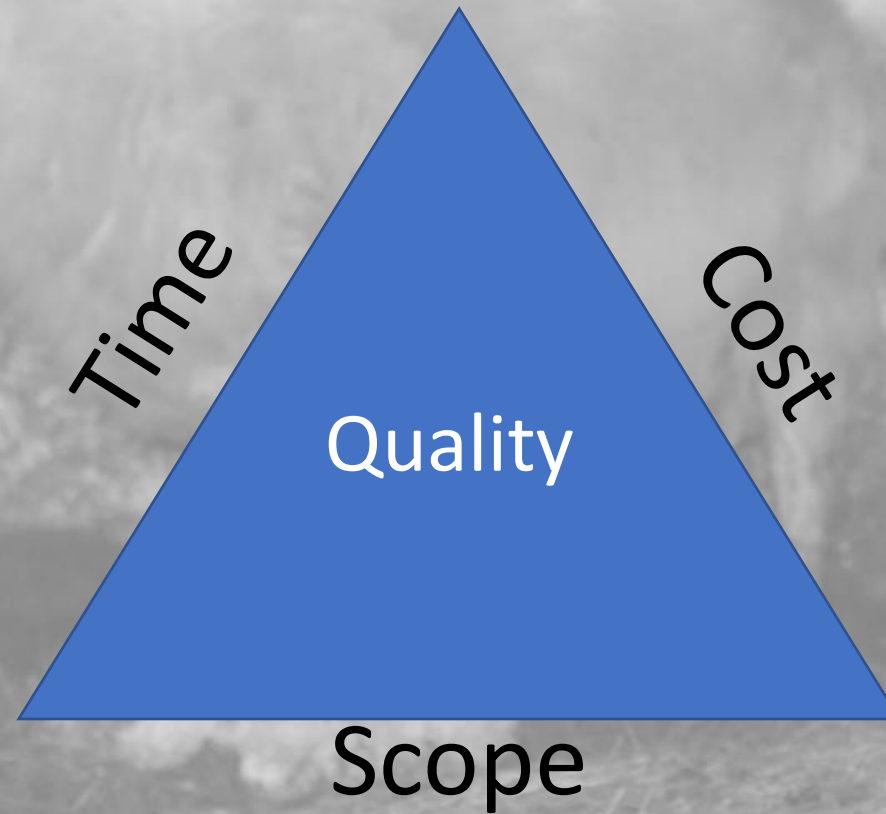
=(80+16+4(32))/6

"Thanks. With my PERT analysis, I'm going to schedule 37 hours."

Reflection

Triple Constraint

Quality

Time

Cost

Scope

Traditional   vs   Agile

Estimated
Resources   Estimated
                         Schedule   Estimated
                                                               Features

Estimate-driven

                                                          Priority-driven

                Fixed   Fixed   Fixed
                Requirements   Resources   Schedule

Adapted from: Lynch, Patrick J., and Sarah Horton. 2016. *Web style guide : foundations of user experience design*. 4th Ed. New Haven : Yale
University Press, 2016 , p. 73

What drives your project

Traditional

- Deadline
- Budget
- Need different Subject Matter Experts at different times

Agile

- Software
- Iterative
- Hard to define
- Set team

- Have a Charter so everyone knows about the project
- Get Sponsor to approve your plan
- Clarify everyone's roles and who does what
- RACI
  - R – Responsible for performing the task ("The Doer")
  - A – Accountable for the task being completed ("The Buck Stops here")
  - C – Consulted prior to the task being completed ("In the Loop")
  - I – Consulted after the task is complete ("Kept in the Picture")

RESISTANCE FROM COLLEAGUES

ARE THEY DELIBERATELY KILLING THE IDEA BUT TRYING TO AVOID BEING DISAGREEABLE ABOUT IT BUT JUST LETTING IT DIE FROM ATTRITION? OR DO THEY REALLY ACTUALLY MEAN IT WHEN THEY SAY THEY AGREE WITH THE IDEA IN PRINCIPLE BUT JUST DON'T WANT TO BE BOTHERED TO FOLLOW THROUGH? I DON'T KNOW, I CAN'T TELL THE DIFFERENCE.
@shelley_gee

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Books

PMP Books

Library specific

- The No-nonsense Guide to Project Management
- Barbara Allan
- https://www.alastore.ala.org/content/no-nonsense-guide-project-management

- Project Management in Libraries: On Time, on Budget, on Target
- Carly Wiggins Searcy
- https://www.alastore.ala.org/content/project-management-libraries-time-budget-target
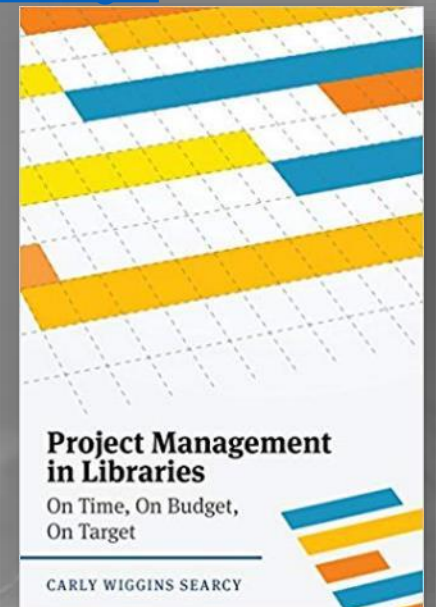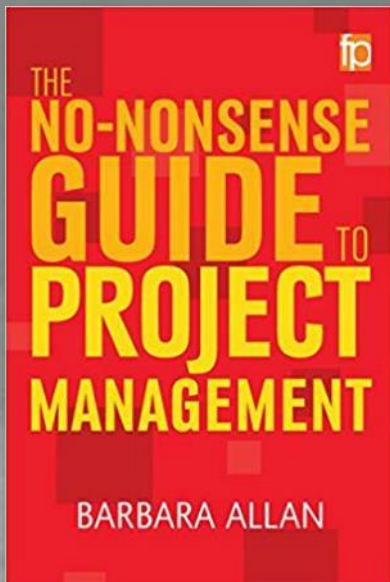
PMP Books

General and interactive

- Head First PMP: A Learner's Companion to Passing the Project Management Professional Exam

- Jennifer Greene, Andrew Stellman

- Head First Agile: A Brain-Friendly Guide to Agile Principles, Ideas, and Real-World Practices
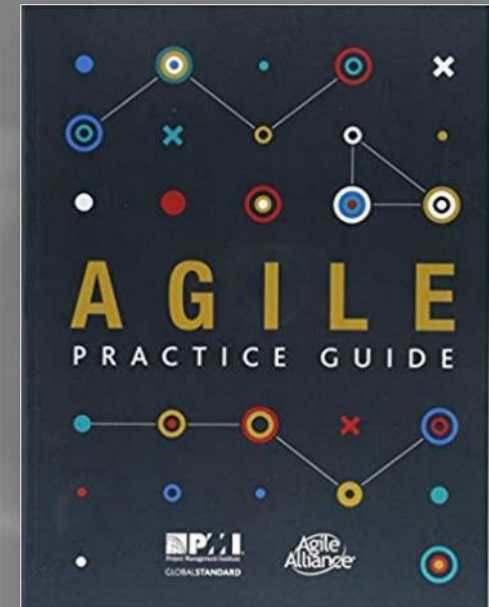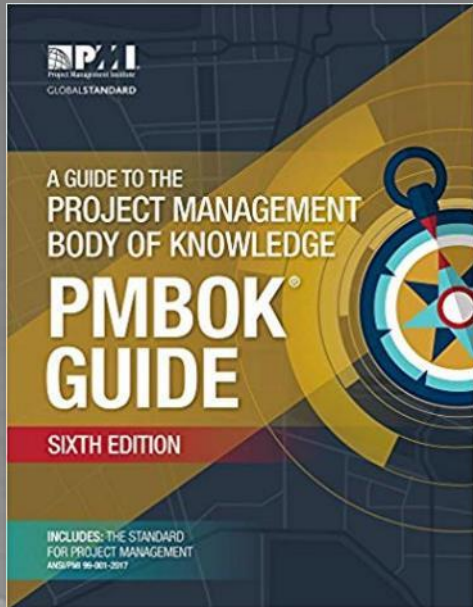
- Jennifer Greene, Andrew Stellman
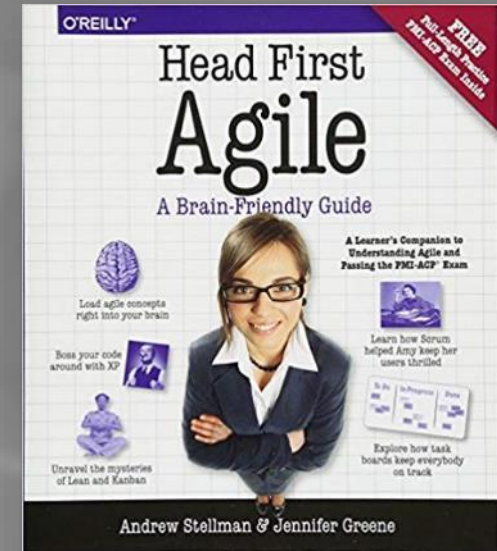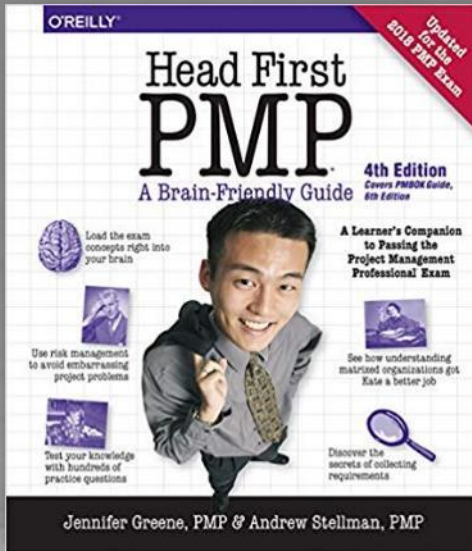
PMP Books

Authoritative (and kinda boring)

- A Guide to the Project Management Body of Knowledge (PMBOK® Guide)–Sixth Edition
- Project Management Institute

- Agile Practice Guide
- Project Management Institute

Thank you

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