business
management

Managing Your Library's Technology Projects

By Debbie Schachter

One truth about librarianship is that our skills are not as simply defined as other professions. We are valued for our specific skills as information specialists, while at the same time most of us are also generalists, building skill sets through a broad spectrum of business processes and management experience. Most librarians are regularly involved in providing service, training, supervision, and planning. One of the other most prevalent roles that we play is that of project manager.

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. As librarians we must hone our project management skills to ensure that we are capable managers of our own projects, and through that obvious capability promote our broad-based skills throughout our organizations. A good project manager will be called upon to repeat project successes in other less traditional library settings.

What is a project?

As it is often said, a project is something that has a defined beginning, middle, and end. If it's ongoing it's a program, not a project. Often, projects may become programs, and this requires another level of planning, based on the strategic directions of the organization. This column provides a librarian's focus on project management best practices.

Many of the projects we manage in libraries involve technology, and project management related to technology gets the most press. The sobering fact is that most technology-related projects have a significant level of failure, or at the very least are often very delayed and do not result in the originally planned outcome.

Estimates of project failure rates in technology projects can range as high as 30 per-

cent to 50 percent. For all projects, however, there are a number of best practices that should be implemented to ensure that your project doesn't fall into any of the easily avoidable pits. We can take many lessons from the successes and failures of high technology projects, and apply the best practices to whatever projects we manage.

All of the literature on project management emphasizes the importance of planning in order to achieve success. "Projects fail because of poor planning and fuzzy requirements that cause a chain reaction of poor productivity."[1] Allocating significant time to the front end of the project, specifically in the planning phases, will reduce the likelihood of problems arising later in the project.

The actual project should be broken down into several phases. For complete details on project management best practice, refer to The Project Management Institute's Body of Knowledge (PMBOK), which creates 37 processes within the project phases. In practical terms, the project can be broken down into five phases that encompass the PMBOK's 37 processes. For the purposes of a library project, these phases can be defined at a fairly high level, as follows:
• Start
• Scope
• Planning (including resource allocation and responsibilities)
• Monitor and control (including risk management)
• Completion (including post-project review)

Project Start

The start of the project can be defined as the date when the funding begins, the timeline starts and the defined work (outside of regular activities) begins. But obviously before anything can begin you must be clear on and have already created a sketch of the overall objectives of the project. This phase of the project combines planning for the overall time frame, the general plan for the project, and general identification of the resources involved. The start may be an obvious break from your regular daily work into only project work, or it may be the start of the specific allocation of project time within your daily work.

Scope

This phase of the project is one of the most crucial to success. By spending sufficient time on the scope of the project, defining what you can realistically accomplish based on your overall objectives and purpose, you will increase the success of your overall plan. What is feasible to accomplish and what is the feasibility of taking on this project? (That is, does it serve your purposes in the long run?)

What will you be delivering at the end of the project? Make it known what you can achieve, and obtain buy-in to these goals at higher levels in the organization, or with other stakeholders, if this is appropriate. Identify and cultivate a champion in a position of authority who will be able to provide advice and support throughout the project. This is also the time to stop a project before

Debbie Schachter has a master's degree in library science and a master's degree in business administration. She is the Head of Strategic Planning and Development at the British Columbia Courthouse Library Society, where she is involved in planning and managing organization-wide projects, marketing and communications, Web site management, and branch supervision. Schachter has more than 14 years of experience in management and supervision, technology planning and support, and reference service in special library settings. She can be contacted at dschachter@bccls.bc.ca.

it gets started if your plans are unrealistic or unachievable, given the resources and the expertise in your team. Begin the process of managing expectations by involving those who need to be involved, including those who will be impacted by the project, such as the staff or the customers of the end product.

Make sure to manage the expectations of those who hold political or financial decision-making power. By doing a thorough scope of the project you should be able to identify the potential risk areas, which can make or break the success or the timely completion of the project. Make sure to note the risk areas in your planning phase.

Planning

The planning phase should comprise a relatively significant amount of project time, as does the scope. When planning, make sure to include an overview of how the project will roll out, including specific and achievable tasks and milestones. Identify which resources will be allocated to the project, including staff time, technological support, equipment, funding, and when these resources will be required. For example, identify who is assigned to do what and when; what type of technology/software/computer support you will require at each phase, etc. Ensure that there is no overlap of resource allocations, and that there is sufficient time allocated to each activity. Be clear on which project tasks need to be completed before the next activity can begin, and which tasks can be developed in parallel.

During the planning phase you will also need to complete user requirements and prototyping as required in a technology project. Provide updates to those who need to know about the progress of the project as you develop your detailed plans.

Monitoring and Controlling

As the project manager, you will need to ensure that lines of responsibility and project control are clear to all members of the team. Specifically, the project manager must retain control over all modifications to the scope and plan of the project. During the actual implementation of project work, spend a lot of time communicating with team members and hold regular group meetings to make sure that everyone has access to the same information.

Review the plan as it is being implemented. Keep track of milestones and identify problems staff encounter in trying to meet specific goals; if milestones are unrealistic you will soon find out and must deal with them promptly. Milestones that

cannot be completed on time have a compounding impact upon the timelines for the entire project.

In many projects there are often several streams of activity being carried out simultaneously, and their milestones may or may not be interdependent. One incomplete task may hold up the entire project, as other completed tasks cannot move forward without it. This is why it is essential to be aware of where risks will likely occur (assessed during the scope of the project), so be prepared for them in your monitoring of these specific tasks or milestones.

Do not assign blame for failure to meet milestones, and do not allow team members to blame each other for problems that may occur. By having regular meetings and sharing information among all team members, problems can be resolved in their earliest stages and team members will be less inclined to hide their concerns. Act as soon as possible to rectify any problem that you or your team identifies, and monitor the situation closely should you need to add more resources or make a change to planning or to the scope.

When you identify a need to change the original scope during the process of doing the work on the project, due to a problem or new suggestion, have a method of change control. Ensure that the process for managing and implementing change requests, including identifying a specific individual for approving changes to the scope of the project, is clear to all members of the project.

Don't give in to pressure to make changes that you believe are unnecessary. Scope creep, like invasive ivy, will attempt to overrun your project and can be one of the project killers if it is not managed through effective planning. Create a clear process to manage change orders. Include a (fairly) rigid set of criteria for allowing changes to scope, and specify the authority to approve change, to reduce problems. Get the support of your champion to ensure that the project doesn't get derailed by competing stakeholder pressures when you're already underway.

Completion

At the end of the project you can congratulate yourself and your team for the successful completion of the project. Whether the project is a complete success, partial success, or has limped to the finish line, you need to do an audit of the process so you and your team can learn from each unique project experience. Undoubtedly there will be lists of issues that you wish you had planned for and will be more aware of, and you will be able to identify best practices that worked or didn't work as expected, for implementation in the next project.

You will also need to continue some work on refining and tidying up, such as refining the new system or technology. This will be evident as you begin to use the new system or service and can identify where it can be improved.

Conclusion

Project managers, while not always individuals in authority within their organizations, are individuals who are able to communicate well, lead and motivate teams, and are skilled problem-solvers. Librarians are ideally suited for project management due to our expertise in the areas of planning, supervision, information analysis, and other general skills. As these best practices indicate, project management combines a number of common sense practices into a cohesive and clear methodology. By using the best practice project management methods, you can be assured that each project you manage will be properly planned and developed. Whether the project is a complete success is not always in your control. Ultimately, though, it is good planning and communication that lead to successful projects.

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[1] Margo Visitacion "Project Management Best Practices: Key Processes and Common Sense," page 1. ●