Sheriff, IRS Auditor, Psychotherapist, & Hostage Negotiator All in One:
Project Management for Everyone

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Introduction

Projects! Academic libraries are filled with them and everyone is expected to play the role of project manager at some point in their career. Someone once described a project manager as a "sheriff, IRS auditor, psychotherapist, and hostage negotiator" which (if true) shows that project managers need a broad set of skills, and will play many roles on the teams they manage. But they also need tools and methodologies to organize and communicate their team's work. With increased attention on project work in our organizations, academic libraries must build project management skills in staff, and implement the processes to support successful project management. At the University of Minnesota, we developed a standard, lightweight structure of best practices for project management such as proposing work, running meetings, breaking down work, tracking work, communicating with stakeholders, policing the borders, defining roles, and closing out a project. We will discuss the process of developing these standards, and the challenges and opportunities faced in scoping and deploying them.

Background and History

The University of Minnesota Twin Cities (UMTC) is a large, public, land-grant institution of 51,580 students (30,975 undergraduates, 16,389 grad/professional, 4,216 non-degree) and 4,500 faculty. As the only research library in the state of Minnesota, University Libraries' 320 FTE staff support a wide range of learning and research activities and manage a collection of nearly 8 million volumes. The University Libraries comprises 12 physical facilities across all three of the UMTC campus regions. The Mississippi River bisects the Minneapolis campus, with facilities on both the east and west banks, while the Saint Paul campus sits a few miles to the east of the Minneapolis campus. The physical size of the campus and geographic distribution of Libraries staff presents significant challenges for collaboration and project work.

The University of Minnesota Libraries is known for its innovative, profession-leading projects and initiatives, and was the 2009 recipient of the Association of College and Research Libraries Excellence in Academic Libraries award. Current notable initiatives include: the Minnesota Digital Library, a major service hub of the Digital Public Library of America; the Library Data and Student Success (LDSS) project, which has conducted groundbreaking research around connections between library use and student outcomes; and the Data Curation Network, an Alfred P. Sloan Foundation funded project with five partner institutions seeking to develop a

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shared network of data curation expertise. The Libraries has operated an institutional repository, the University Digital Conservancy, since 2007, a data repository (DRUM) since 2015, and recently launched a new Libraries Publishing service. Digital preservation and the Digital Arts Sciences and Humanities (DASH) digital scholarship program are also gaining momentum.

These initiatives, along with the day-to-day work of evolving and advancing library services, generate numerous projects, with many operating simultaneously and engaging staff across all four Libraries divisions, and sometimes also faculty and staff throughout the University. The Libraries and the University have a long history of engagement with project management methods and training. The University-wide Project Management and Change Management Collaborators[1] (PCMC) launched in 2007 as "a peer-based, action/practice oriented, collaborative network" which holds regular events to share knowledge and build skills. The Libraries in 2012 founded its own group, the Project & Group Management Network,[2] and invested in training on topics such as decision management, managing expectations, breaking down work, developing project scope, and more.

By 2015, however, project management practices within individual divisions and departments were still significantly diversified as more projects were being implemented across multiple divisions. Though a few areas followed structured methodologies and used online project management tools like Trello and Asana, many others used ad hoc methods and practices. Other forces were shaping the organization as well. The University had completed its migration to the Google suite, with real-time shared document editing, integrated calendaring, and Hangout access, which had dramatically simplified the task of participating in meetings with remote participants. The Libraries were also about a year beyond its unified library system migration, a massive project that engaged the entire organization for more than a year. It was also preparing to "operationalize," or distribute throughout Libraries departments, the Libraries-wide initiatives it had sponsored to accelerate work in four key areas: data management and curation, elearning, content services (including online publishing) and interdisciplinary research.

A Renewed Conversation

One of the co-authors of this article, Claire Stewart, arrived in early 2015 after 21 years at Northwestern University, where she had spent her last three years deeply immersed in the Scrum[3] agile project management framework. She began conversations with her directors and fellow AULs, including this article's co-author, Kate McCready, then serving both as an interim AUL and lead for the Content Services initiative, about best practices, training, support, and shared expectations for project management. Many staff reported a continuing strong interest in project management, but frustration that many projects seemed to get started, but tracking them, receiving updates, and, perhaps most importantly, determining whether or not they had concluded and completed planned deliverables, was difficult. Stewart was particularly concerned that there was no shared list or dashboard of projects for her division to show projects in progress at any given time. There was no easy way to see what work was underway, which staff was working on or leading projects, nor to pinpoint where stalls or other setbacks might have occurred.

These conversations yielded a general agreement that the time had come to re-invest in project management training, and to make an organizational commitment to do so in parallel with a commitment from leadership to providing ongoing support and reinforcing the importance of shared practice. The AUL team, in conjunction with Human Resources/Organizational Development staff, hosted a series of conversations and sponsored some targeted investigations, including a review of previously created project management training manuals and a project management tools showcase, to determine an approach. A small group evaluated project management support tools including Asana, Trello, Wrike, Jira, and others. It was found that use of Asana and Trello

was evenly split across the departments and divisions and these two had the most adoption. Through these and other related investigations, it became apparent that requiring all units to standardize on a project management tool and a project management methodology was not likely to be a winning strategy. A certain amount of process wariness had built up in some parts of the organization. The AULs were also keenly aware that, overall, the Libraries was a highly successful, agile and innovative organization despite the lack of a shared project management methodology. The decision was made, therefore, to pursue a more lightweight strategy to provide simple tools, shared best practices, and additional training to assist project managers and staff who might be assigned to project teams.

In November 2015, the co-authors took a 3-day trip to Purdue University and Indiana University. During the many hours driving between towns and waiting in airports, they devised a short list of six key practices that, if understood in common, they felt would lead to a successful culture of project management. In subsequent conversations with colleagues, including a joint division-wide meeting, the list grew to seven with the addition of 'Closing out projects.' The list of practices became:

1. Writing proposals and gaining approval
2. Running meetings and tracking outcomes
3. Breaking down work
4. Tracking work visibly
5. Communicating with stakeholders and managing the unexpected
6. Identifying roles and responsibilities
7. Closing out projects

After vetting the list with other leaders, a new Project Management Processes Task Force (PMPTF) was charged to turn the list into a fuller set of practices and principles.

The Project Management Processes Task Force

After developing the charge and determining the scope of the task force, senior leadership of the Libraries needed to populate the group. Unlike most other committees and teams in the Libraries that pull in people based on their individual expertise, the goal for the PMPTF, to bring cohesion and standardization to the Libraries' project management processes, meant that members were not sought as much for their relevant knowledge as for their ability to serve as a representative from their part of the organization. If a potential member had experience and skill in project management processes, this was a benefit, but it wasn't a requirement. Directors and managers throughout the Libraries reviewed the charge in order to suggest names of participants that could represent their department or area of the organization. The group was formed with 14 members, representing every division of the Libraries. The members had a wide variety of knowledge and experience in project management including a few who had no experience at all, but had hopes to bring more knowledge back to their unit.

The PMPTF kickoff process included reviewing and understanding the charge, learning more about members' knowledge of project management, and establishing methods for operating as a group. The Task Force also began to set up the tools and systems to structure their work. Because the University Libraries' staff were by then using all of the Google Apps extensively (e.g., Gmail, Google Groups, Google Calendar, Google Docs, Google Drive, etc.), the PMPTF made the early decision to leverage these tools both for the work of the Task Force, and also in the development of any new processes or procedures.

Though some of the teams and committees in the Libraries used additional project management tools (e.g., Trello, Asana, Wrike, Basecamp, etc.) to organize action items and workflows, the majority of the shared work across divisions happened in Google apps. Additional tools are not discouraged; however, the Task Force's in-

vestigation reinforced the decision that it wasn't feasible to dictate the adoption of a single tool by the Libraries. First, it wasn't possible to have a Libraries-wide instance of either of the two most-used tools (Asana and Trello) because both implemented "organizational" instances via email domains. At the University of Minnesota, there are well over 100,000 users with "umn.edu" email addresses and there was no way, at the time of investigation, to automatically limit the project management accounts to Libraries' staff. Additionally, there were strong preferences for specific tools for specific types of projects and no clear "top choice" within the Libraries. Because of that, the Task Force, along with the sponsors, decided that the processes and procedures would be built around Google Apps, and would recommend using either Asana or Trello (depending on group preference) if an additional tool was needed.
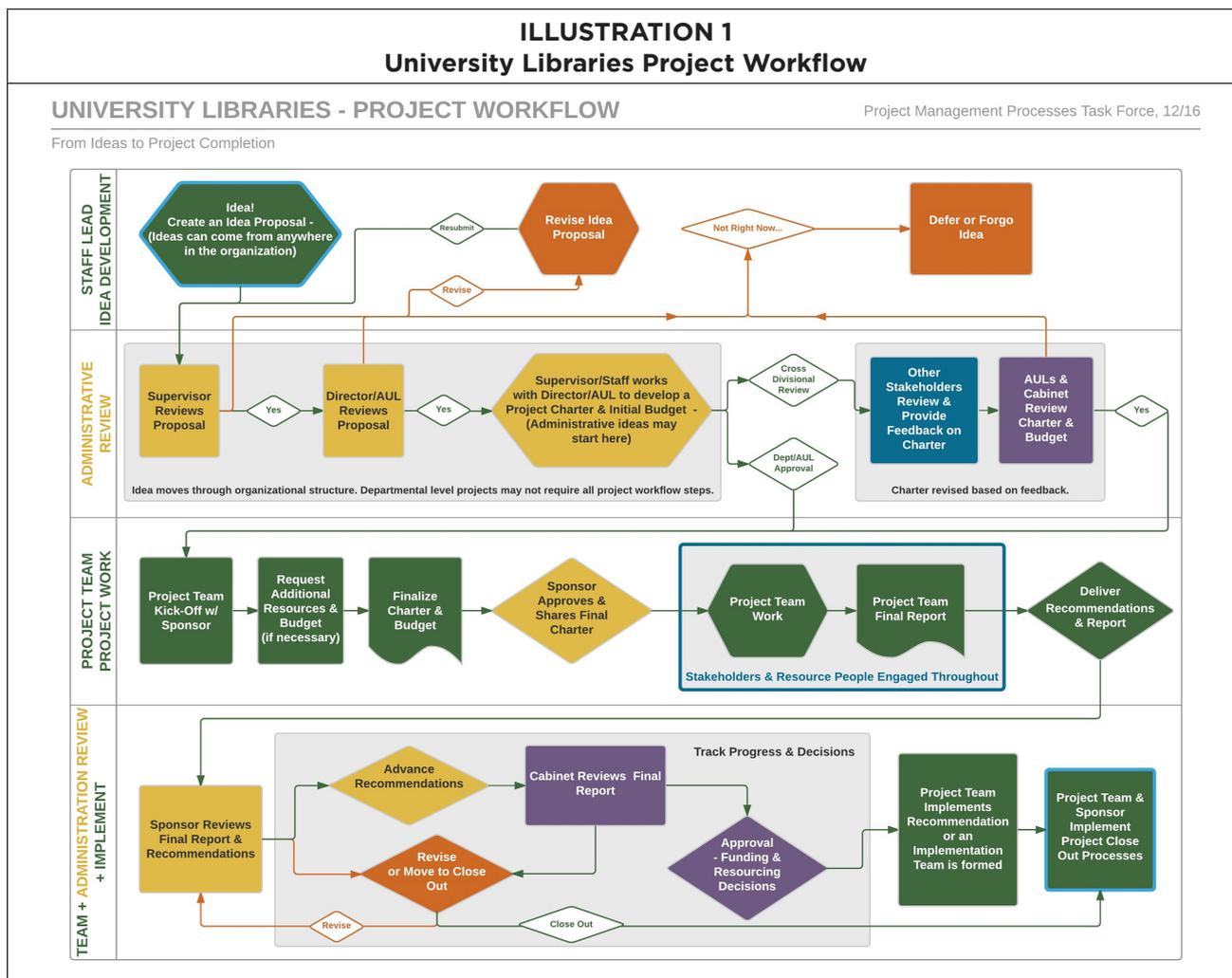
Once the scope and the method for operating this group was clearly defined, the real work of developing a "lightweight set of project management processes" for the staff at the University Libraries began. Though representation from across the Libraries' system ensured comprehensive perspective, a group of 14 people proved challenging to schedule and difficult to coordinate. After brainstorming and clustering the seven items from the charge into four themes, the co-chairs proposed breaking the larger task force into parallel sub-groups to tackle the work. The four themes were:

1. Proposal, Roles, Closeout
2. Meetings, Capturing Decisions, Following Up
3. Communicating & Policing the Borders
4. Breaking Down & Tracking Work

These four smaller groups then set to work to identify clear, concrete outcomes for the seven areas of the PMPTF charge and created a total of 37 outcomes. The full Task Force then met to further refine these to avoid duplication of effort and to ensure that they were concrete but lightweight. The outcomes included items such as:

- Develop a workflow for proposal idea pitch & review
- Create a project idea proposal template (e.g., scope, resources required, schedule/timeline)
- Develop a project charter template
- Recommendations for clearly defined roles/responsibilities in relation to the scope of the project.
- Identify a kick-off process for the team and senior leadership.
- Guidelines for planning and leading meetings (including developing a meeting agenda template)
- Identify major communications needs and best practices for most projects (print, online, and in person).
- Develop a template for a communication plan
- Provide example methods for tracking time/activities/roles
- Develop standard best practices for sharing public documents.
- Develop recommended processes for project updates and status tracking
- Create work breakdown template and methodologies.
- Identify a closeout process for the team and senior leadership.

As the outcomes were being developed, McCready, co-chair of the Task Force, drafted a "Project Workflow Diagram: From Idea to Project Completion". This diagram took into account existing processes, but also added new steps where none existed. The Libraries leadership (e.g., director level and above), as well as the project team, provided input and feedback on the diagram to ensure that it captured enough detail to be accurate, but didn't get weighed down with too many options. Throughout the rest of the Task Force's work, this diagram was helpful in determining the primary focus of the materials being developed and how those materials should be organized.

ILLUSTRATION 1
University Libraries Project Workflow

UNIVERSITY LIBRARIES - PROJECT WORKFLOW — Project Management Processes Task Force, 12/16
From Ideas to Project Completion

The subgroups then began their work to produce the materials identified in the outcomes. Over the course of a month, each group produced templates, checklists, recommended strategies, and other types of materials for their assigned areas. After these materials were created, the co-chairs pulled all content together into a single Handbook. Merging the content and editing for duplication and flow was time consuming but extremely necessary. Every member of the Task Force fully participated in reading through the document and marking it up (within Google Docs) with comments, edits, and questions. The full Task Force also participated in a mini-retreat focused on the Handbook. The goal of the retreat was to de-duplicate and streamline the document, and was very valuable in engaging the team, solidifying a shared vision, and developing a final draft of the Handbook. One of the co-chairs printed the entire draft Handbook in 24 pt. font and hung it up on the walls of one of the Libraries meeting rooms. All members of the committee engaged with the printouts by writing comments on the draft, putting colored dots on the areas that needed to be converted to a template, a checklist, or a training resource (vs. part of the Handbook proper) and highlighting areas that should be required (vs. recommended). The task force also noted elements that were duplicative, or missing.

After further editing, organizing, and formatting by the co-chairs to incorporate all the feedback, the Handbook was ready to test. The Task Force identified 8 project teams within the Libraries (at various stages of their work) to test different processes, or templates, or checklists. Several Task Force members took the lead in bring-

ing elements of the Handbook to these "testing teams" with the goal of incorporating their feedback into the final copy. The Handbook's contents were divided into these sections for testing:

- Idea Proposal
- Charter Development
- Identify Stakeholders & Project Team Roles
- Project Team Kick Off
- Charter & Budget Review/Finalization
- Planning for Team Meetings
- Running Team Meetings
- Tracking Work
- Project Data & Documents Set-up
- Breaking Down Work
- Developing a Communications Plan
- Developing a Final Report
- Project Close Out
- Archiving Project Data & Artifacts

The members of the Task Force that were not involved in testing set upon the task of developing training and communications plans with the goals to raise awareness of the handbook and its various components, as well as to provide practice for applying the Handbook's methods to the most common types of projects. The training plan involved identifying objectives and scenarios for all areas of the Handbook (e.g., Given a project charter, use the "Template: UL Communicating Project Milestones" to identify the project milestones you will communicate). The communications plan focused on how the information in the Handbook and training sessions would be conveyed to staff (e.g., via the staff website, through surveys with targeted responses, through progressive training, through online modules, etc.). A launch of the training and communications efforts was imminent at the time this paper was drafted.

Throughout its eight months of work, the Task Force was confronted with several conceptual challenges: How can we keep the processes that we're developing lightweight? How can we bring clarity to currently established practices? How can we invent new standards where the current methods are varied from one part of the organization to the next? Will the Libraries' administration support and reinforce the guidelines, recommendations, and processes that are being developed? What are best practices vs. requirements? How will we most effectively get the Libraries' staff to adopt these practices? These questions, originally raised by Task Force members during team meetings, were shared with the sponsors, and with the Libraries' administrative team repeatedly. They were also discussed many times at Task Force meetings. There was a shared understanding that these questions were ever-present as the Task Force developed the materials and made recommendations for training and new processes. Each new practice was outlined in part by asking these questions about that individual item. It was important that there was an open dialog about these questions throughout the process, both at the team level, and the administrative level and these concerns were not ignored. These questions are also informing the planning for training existing and new staff.

Conclusion

Although the ultimate effectiveness of this organization-wide project management initiative is yet to be measured, the process itself has been highly iterative and inclusive, engaging stakeholders at all levels of the organization. The initiative has already succeeded in instilling broad understanding of the value of a shared ap-

proach to project management, and staff at all levels expect to have access to training and to implement their new skills immediately. Several committees and working groups, including the Libraries Diversity Leadership Committee, stand ready to serve as the pilot group for the first year of implementation, and new staff in the Research & Learning Division will establish the first divisional tracking board to advance the goals of visibility and maintaining updated documentation. By starting with the development of lightweight standards, and creating a typical workflow for projects, the Task Force's work has allowed the Libraries' staff to identify areas of project work where new methods will be established to increase efficiency, effectiveness and communication across the organization.

Notes
1.   Project & Change Management Collaborators, "About PCMC."
2.   University of Minnesota Libraries, "Group Effectiveness."
3.   "Scrum (Software Development)."

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