



Project Management and Pandemics;

Do's and Don'ts in Uncertain Times

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About Me

- Monograph Acquisitions and Metadata Librarian
- Douglas College, Vancouver, BC Canada

- Adjunct Instructor, Project Management at UBC iSchool, Information School (formerly SLAIS)

I don't have answers.

*I only hope I can spur some ideas and
reflection....*

Pandemic Project Problems

- Can't get to the books
- Hard to have meetings
- Meetings are weird over zoom
- Too many emails
- Projects spin in circles because you have the same conversations over and over again???

Projects and Pandemics

- Harder to co-ordinate
- What is the right online tool
- How to keep people (peers) on task

Agenda

- PM 101
 - Agile and Traditional PM
- Digital Tools
- Digital Teams
- Example

*You can't learn to
Catalogue in 45 minutes*

And

*You can't learn
Project Management in 45 minutes*

Change is scary

- We don't know if we can accomplish what we need to do
- We know we need to change but aren't certain if we can do it
- What is your group's risk tolerance

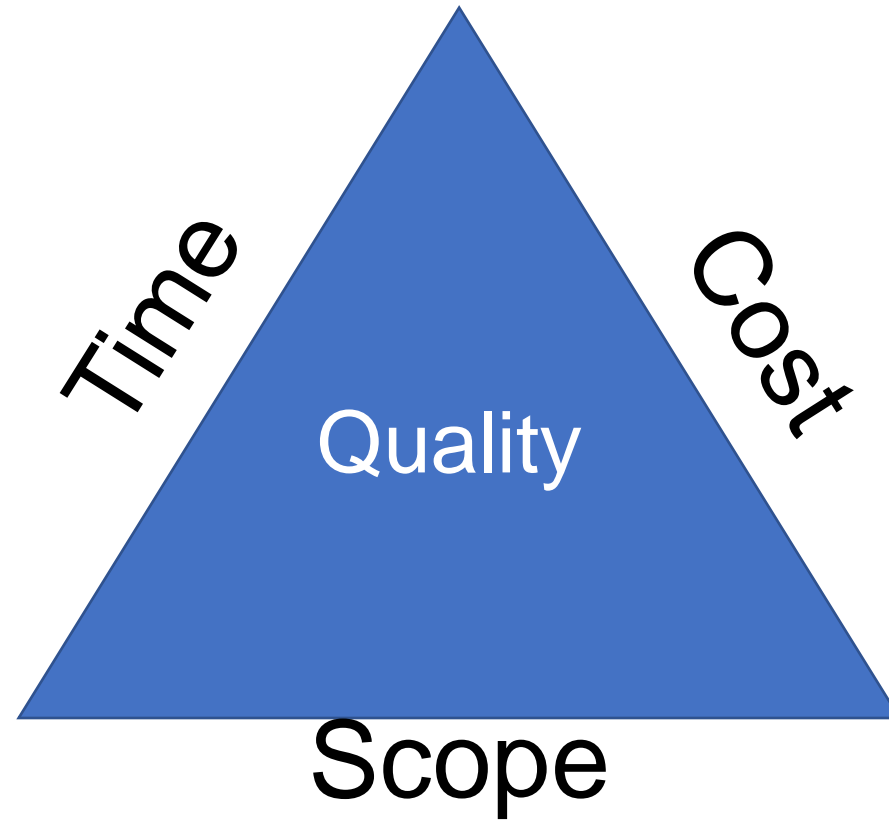
What is a project?

- 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

Triple Constraint





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

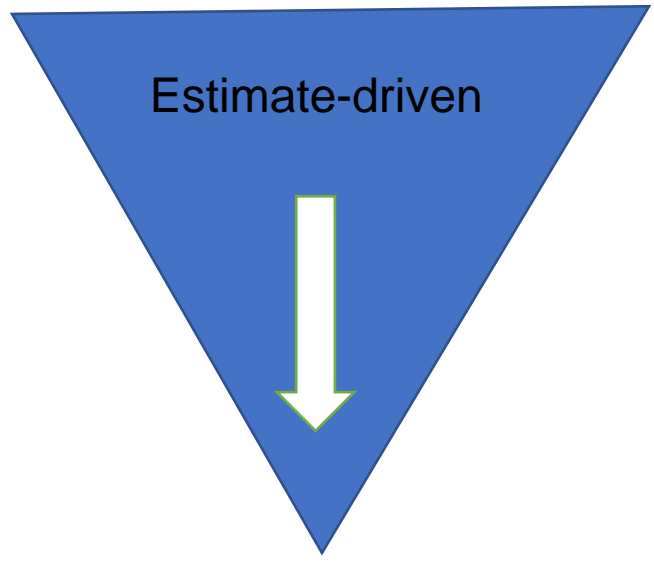
Traditional

vs

Agile

Estimated Resources

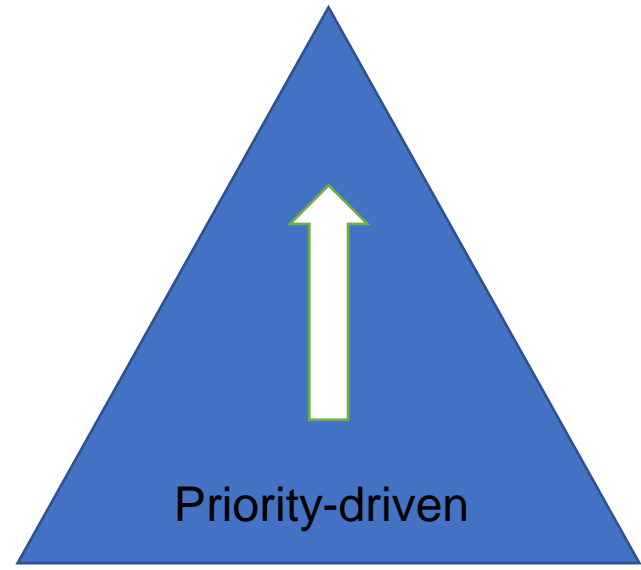
Estimated Schedule



Estimate-driven

Fixed Requirements

Estimated Features



Priority-driven

Fixed Resources

Fixed 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

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

Basic Tools

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.

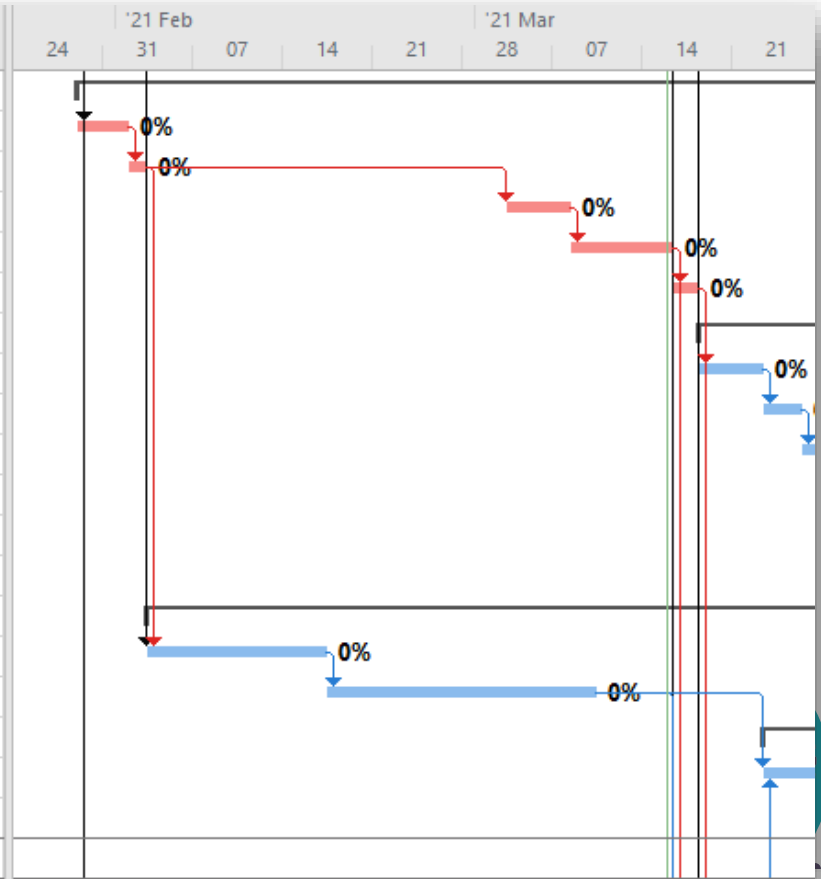
- Funding for the OPAC can be shared equally amongst all members
- Sufficient room will be found for an increased collection
- All groups can share their memberships for a single source for patron records.
- Donors will be able to provide additional titles.



WBS/ Product Backlog



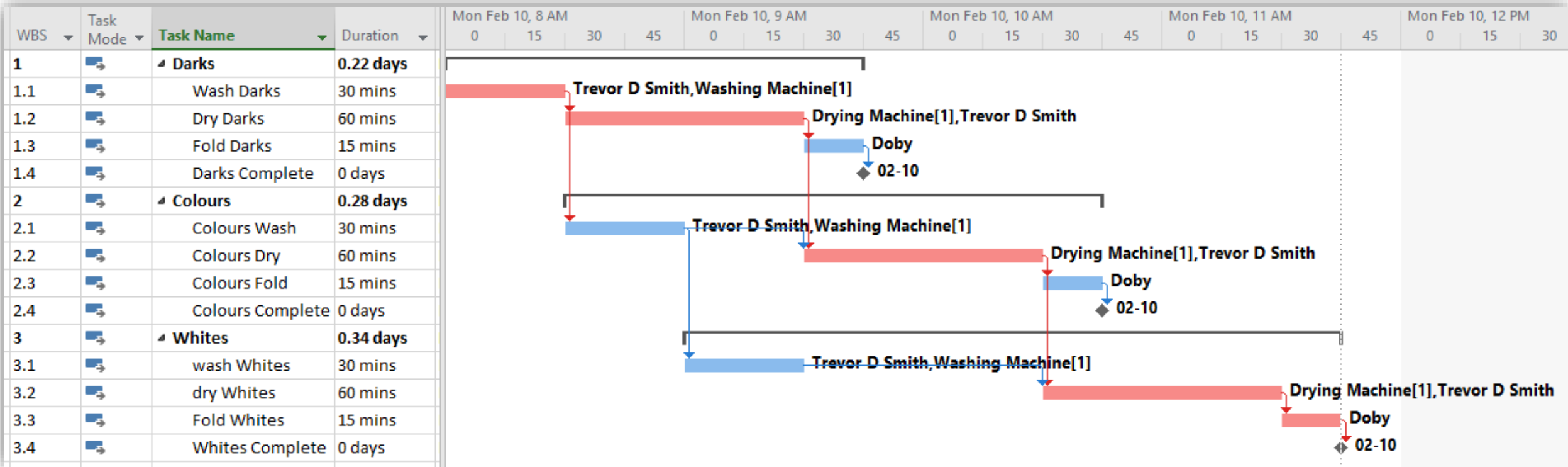
Task Name	Duration	Start	Finish	Predecessor	Resource Names
System	19.5 days	Fri 21-01-29	Fri 21-04-08		
Establish system require	2 days	Fri 21-01-29	on 21-02-01	5	Project Manager, System Manager, Librarian
RFP	1.5 days	ue 21-02-02	ed 21-02-03	19	Librarian, System Manager
Review Proposals	3 days	ed 21-03-03	on 21-03-08	20FS+1 mon	Librarian, Project Manager, Procurement Officer
Choose System	6 days	on 21-03-08	ue 21-03-16	21	Community Members, Librarian, Procurement Officer, Project M
Purchase Hardware & So	2 days	ue 21-03-16	hu 21-03-18	22	Librarian, Procurement Officer
Setup System	12 days	hu 21-03-18	on 21-04-05		
ILS Setup	3 days	hu 21-03-18	ue 21-03-23	23	Librarian, System Manager, System team
ILS Test	3 days	ue 21-03-23	Fri 21-03-26	25	System Manager, System team
OPAC Setup	3 days	Fri 21-03-26	ed 21-03-31	26	System Manager, System team
OPAC Test	3 days	ed 21-03-31	on 21-04-05	27	System Manager, System team
System Troubleshooting	3 days	on 21-04-05	hu 21-04-08	24	System Manager, System team
System Complete	0 days	hu 21-04-08	hu 21-04-08	29	
People	74 days	ed 21-02-03	ue 21-05-18		
User Profiles	10 days	ed 21-02-03	ed 21-02-17	5,20	Community Manager, Community Members, Librarian
Usability Study	15 days	ed 21-02-17	ed 21-03-10	32	Community Manager, Community Members
Communications	15 days	ue 21-03-23	ue 21-04-13		
Project updates for ne	5 days	ue 21-03-23	ue 21-03-30	33,64	Community Manager, Community Members
Signage	5 days	ue 21-03-30	ue 21-04-06	35	Community Manager, Community Members
Press Release	5 days	ue 21-04-06	ue 21-04-13	36	Community Manager, Community Members



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



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

Pessimistic + Optimistic + 4 (Most Likely)

6

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

$$=(80+16+4(32))/6$$

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

“Probably 4 days, maybe 2 days if we're lucky, but maybe 2 weeks if things go bad.”

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.



#IUG2021

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



Scrum in 4 steps

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.



RACI

- 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")

RACI

Completed after the month complete (except in the future)

RACI ANALYSIS														
	Project Manager	Sponsors	Community Members	IT Manager	IT Team	Librarian	Cataloguers	Space Manager	Space Team	Materials Manager	Materials Team	Carpenter	Events Manager	Events Team
Project Management														
Initiate Project	R	A		C		C		C		C			C	
Project Approved	I	A												
Plan Project	A			R		R		R		R			R	
Project Kickoff	R	A	I	I		I		I		I			I	
Monitor and Control Project	A	I	I	R	C	R	C	R	C	R	C	C	R	C
Close project	R	A		R		R		R		R			R	
System														
Establish system requirements	I			A	R	R								
RFP	C			A	R									
Review Proposals	R	I		A	R	R								
Choose System	A	R		C	I	I								
Purchase Hardware & Software	A			R	C	I								
Setup System	I			A	R	C								
System Troubleshooting	C			A	R	I								
System Complete	C	I		A	R	C		I		I			I	
People														
User Profiles	A		C			R	I							
Usability Study	A		C			R								
Communications	A					R								
Meetings	A					R								
User Testing	A		C			R	I							
People Troubleshooting	A		C			R	I							
People Complete	A	I	C			R	I							

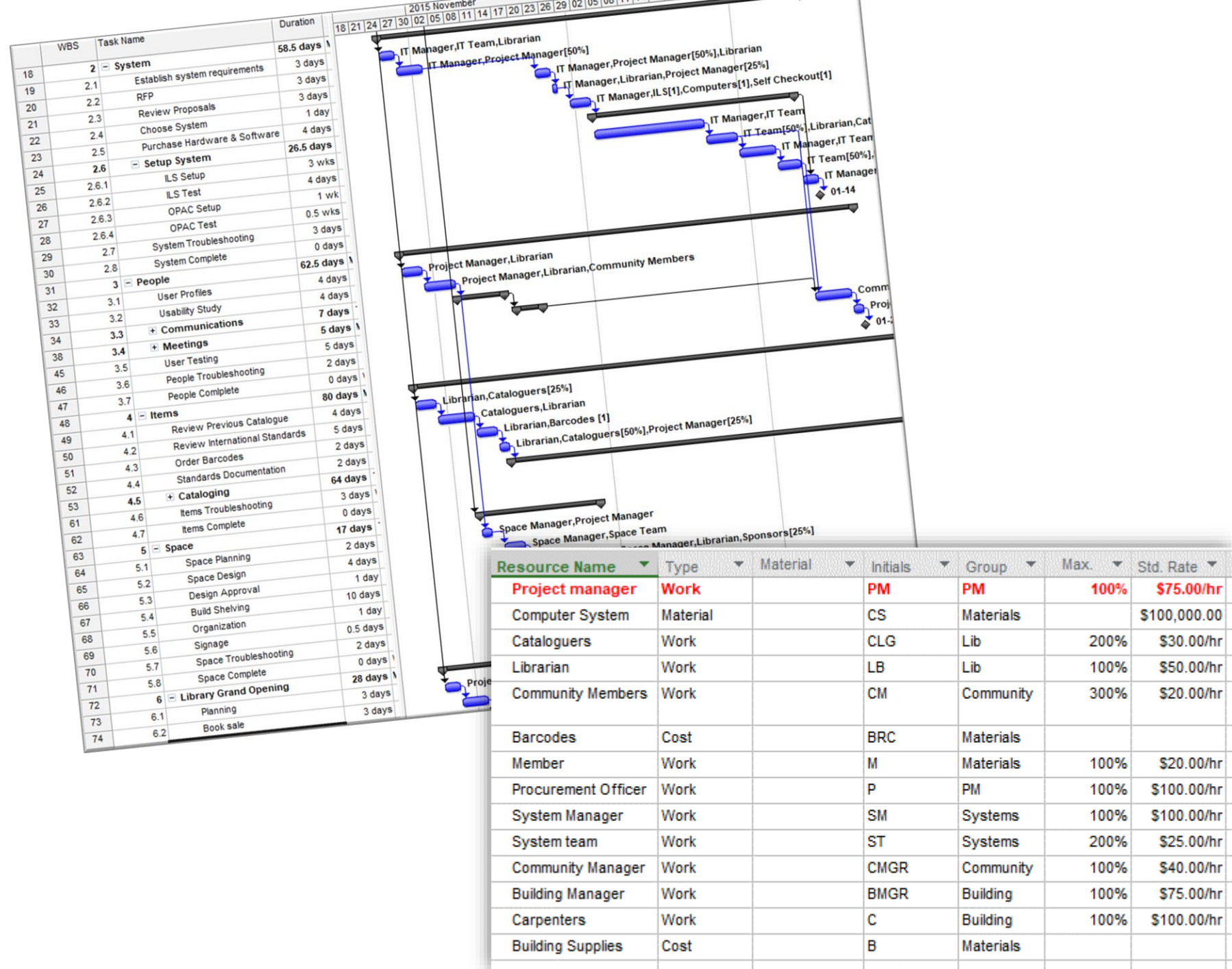
REMEMBER

- Use Traditional “waterfall” for projects with a firm deadline or strict budget
- Use Agile for unknown, iterative projects with a set team
- Charters help the group stay focused and scope creep
- RACI helps track who is responsible and has the final decision

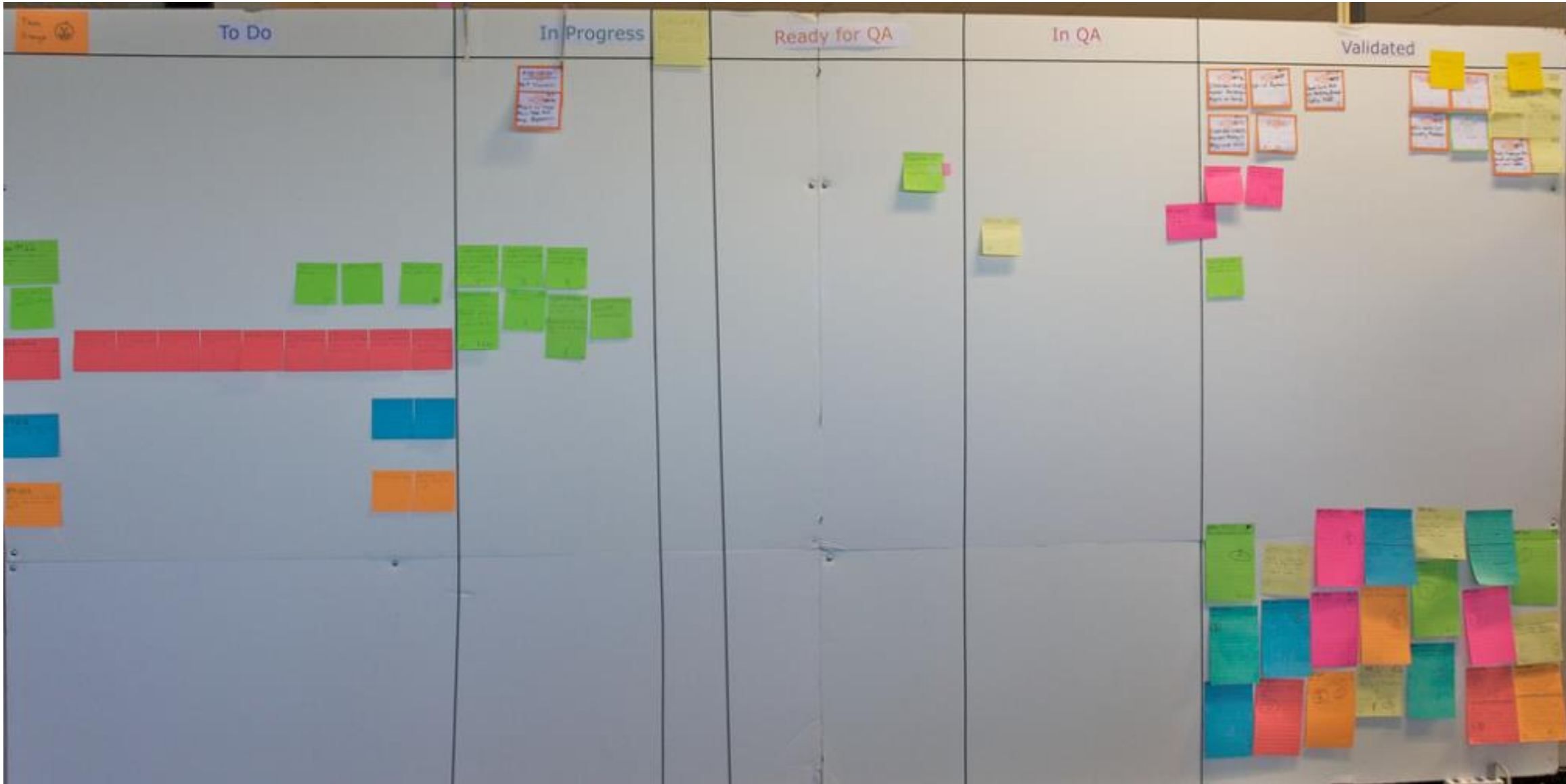
Digital Tools

Traditional

- Microsoft Project
- Gantt Project
- Project Libre



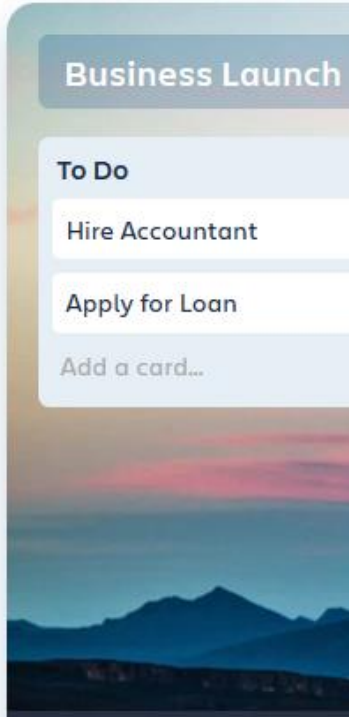
Don't go Chasing waterfalls



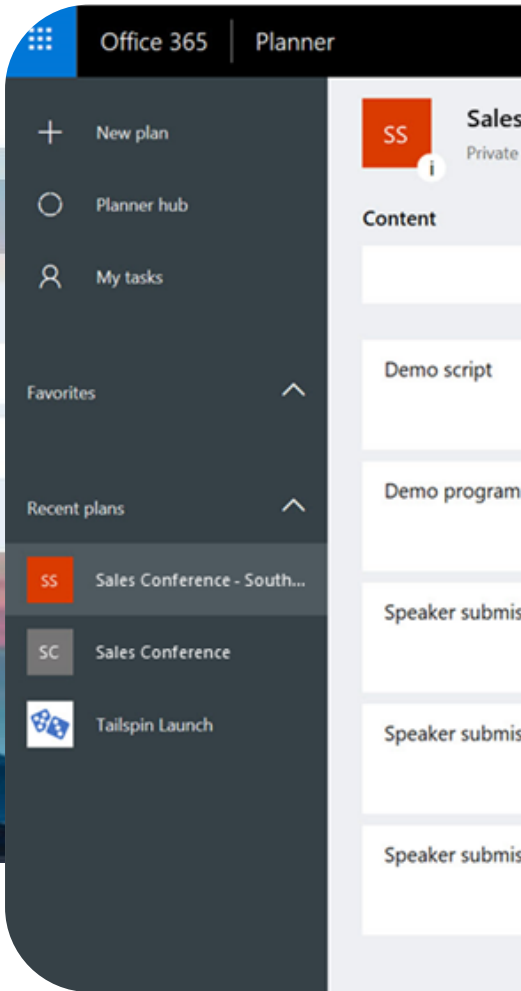
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Agile

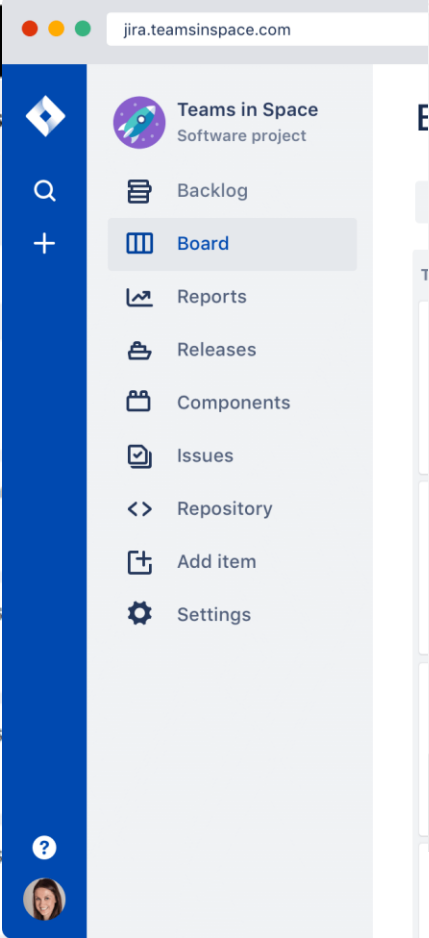
Trello



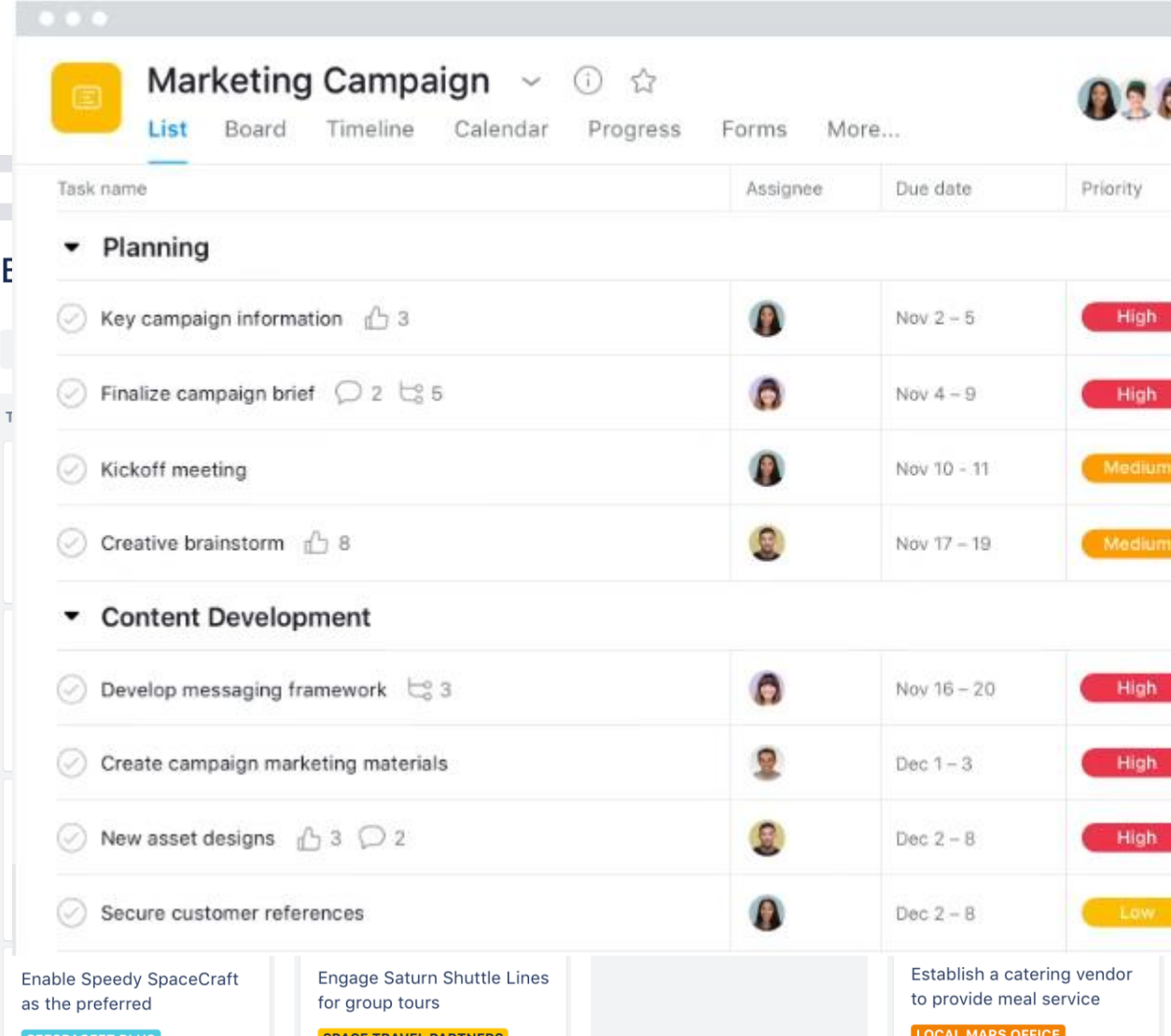
MS Planner



Jira

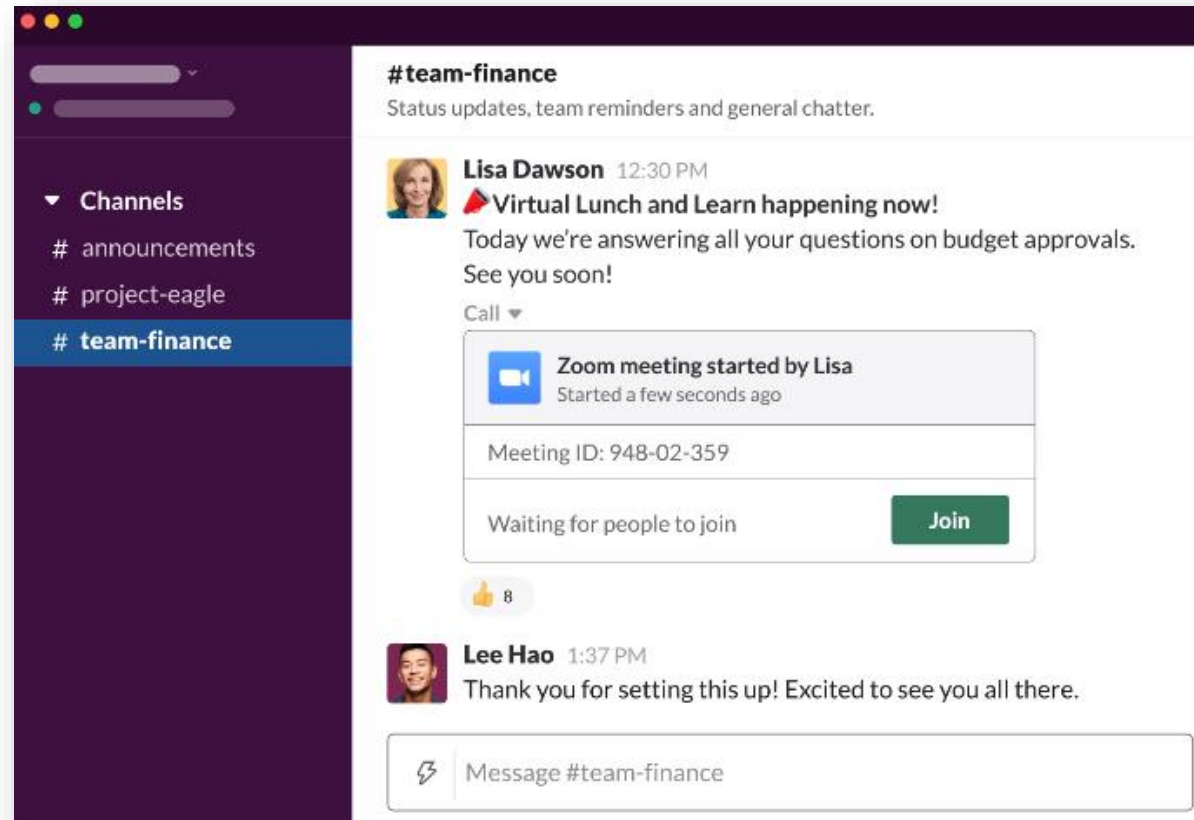


Asana



Communication

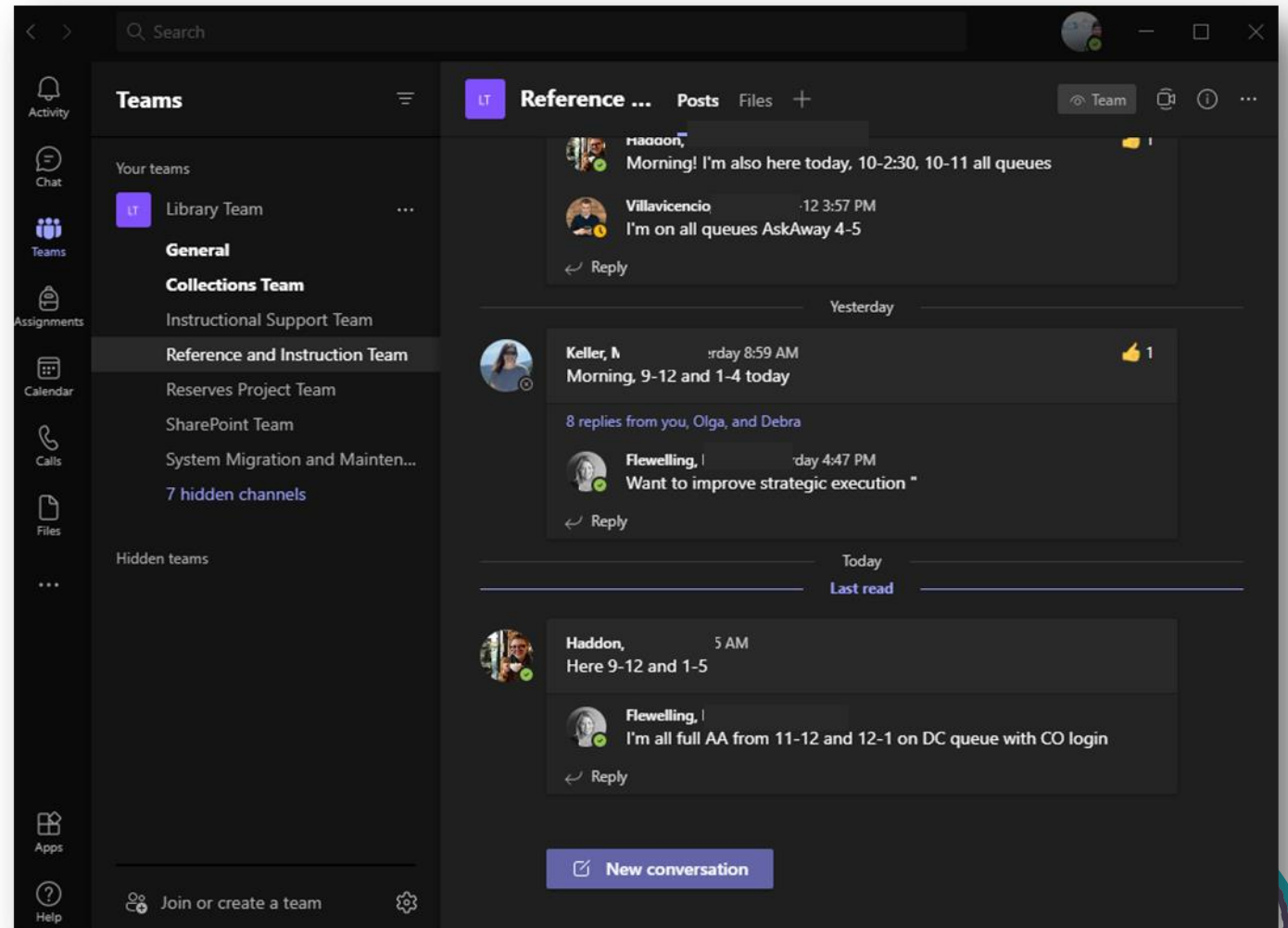
- Slack
- Microsoft Teams (Planner)
- Basecamp



Teams example – Old vs New



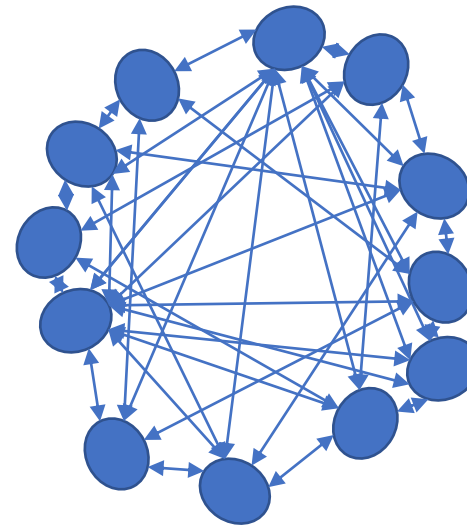
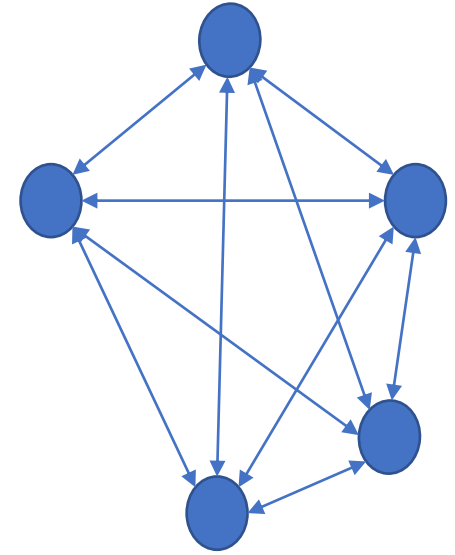
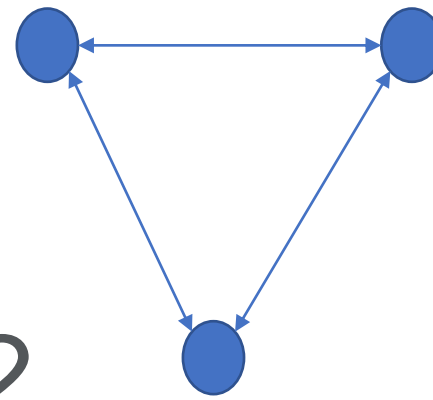
- Email threads
 - Hard to cluster the conversation together
 - If you aren't on the thread = out of the loop
- Team chat channels
 - Different chats for groups
 - Open by default
- Telephone vs Video Chat
- SharePoint files vs SharePoint files
- Planner



Communication channels

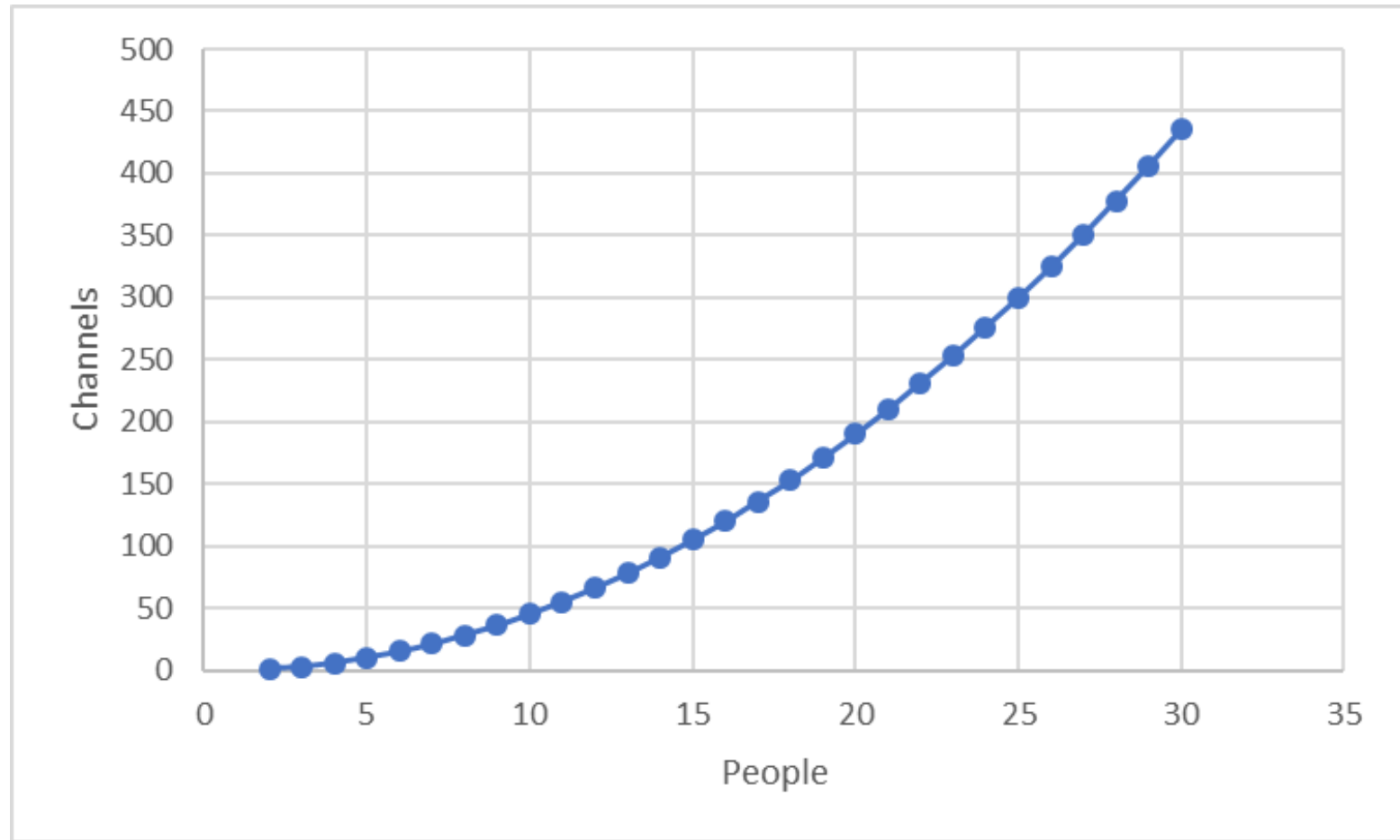
$$n(n-1)/2$$

- 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

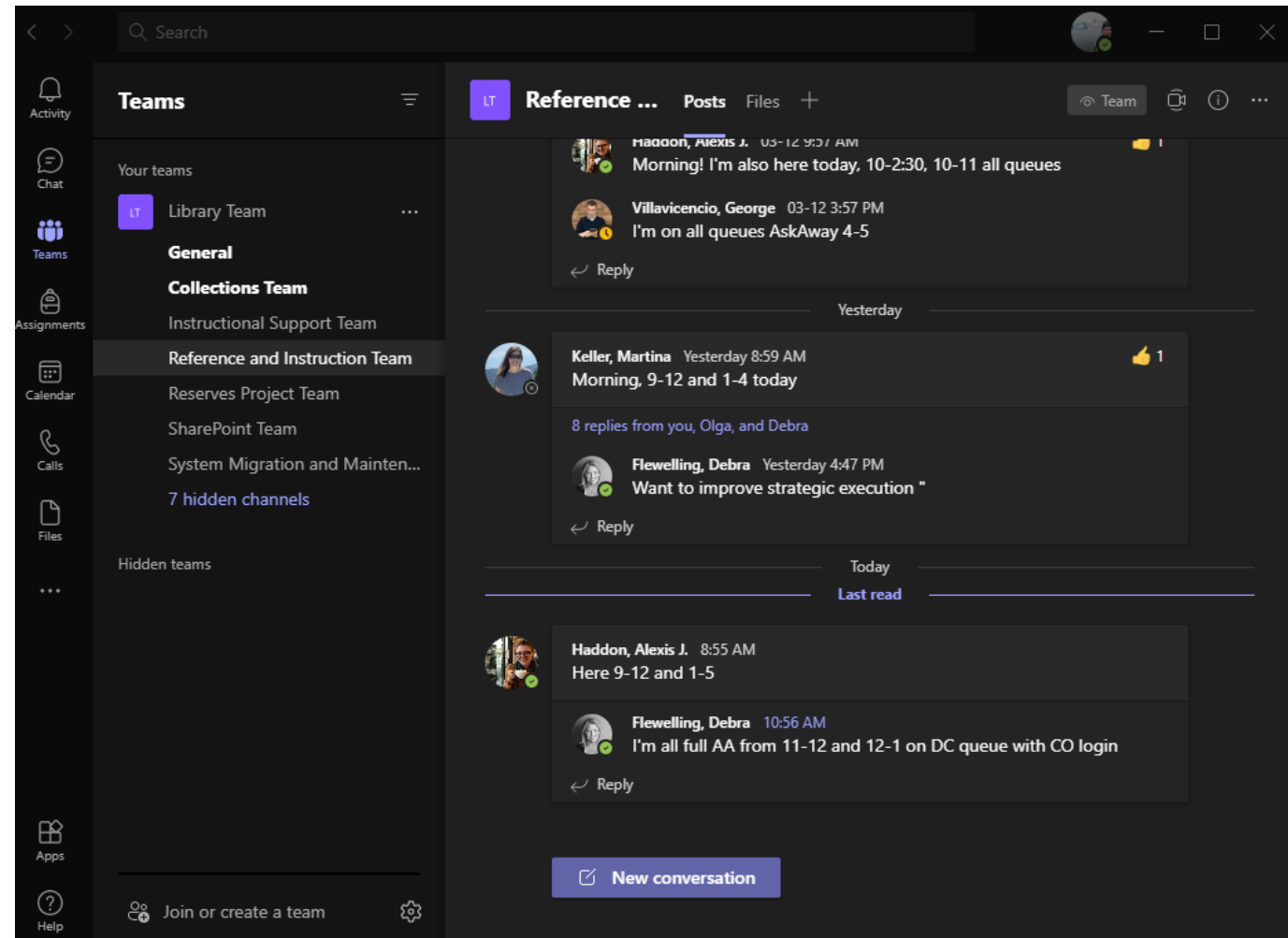
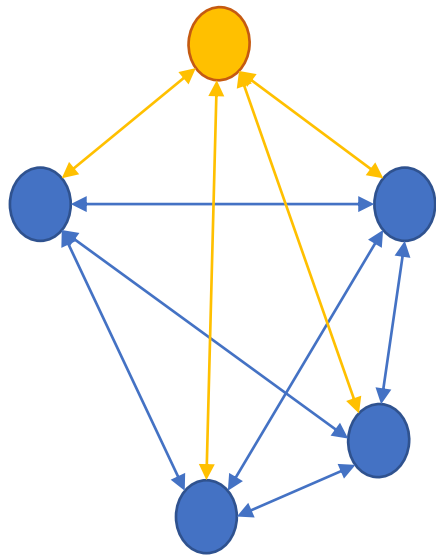


$$n(n-1)/2$$

People	# of Signals
2	1
3	3
4	6
5	10
6	15
7	21
8	28
9	36
10	45
20	190
30	435



Got to be in the room when it happens....



Remember

- Digital tools help focus your team remotely
- Call them “on the phone” with Zoom or Teams or Skype or Jitsi

Digital Teams

Teamwork

- But teamwork with whoooooo?
- Different team members need different kinds of motivation
- How well do you know your team?
- The Parker Team Player Survey
 - Contributor
 - Collaborator
 - Communicator
 - Challenger

Team Norms

- Where and how the team will work together
- Active listening to others
- “Attack the problem not the person”
- Seek to understand first
- Only focus on “this” sprint / feature
- When you see a problem, say something and make a suggestion to resolve it
- Participate in Daily Meetings
- Try to solve conflict with other person. If not possible, BOTH will go to mgmt.
- Don't use email to try and solve problems

How to Communicate

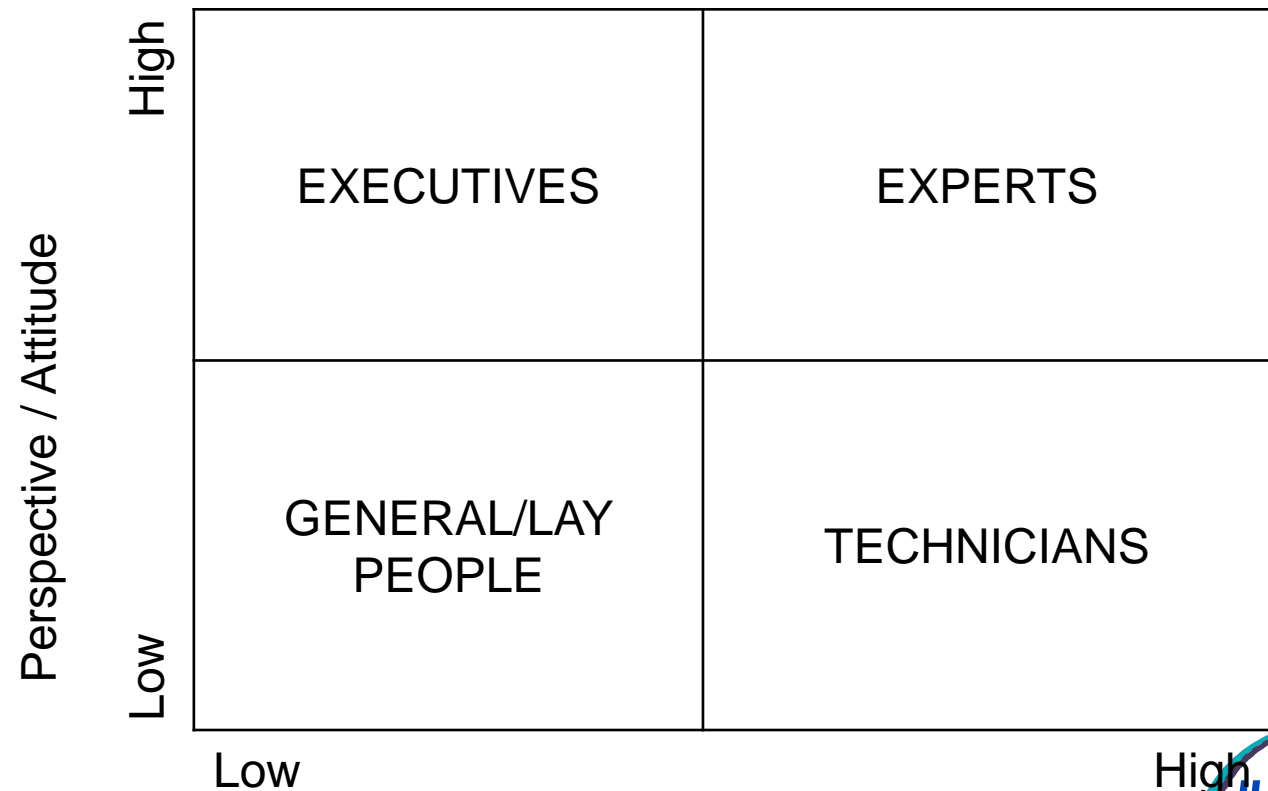
- Face to face meetings are always the most effective for communicating and resolving issues with stakeholders
- Also consider telephone calls, email, Skype, etc ...

Issues Log

- Use this to track and monitor issues and their resolution
- Sort of things that don't creep up as activity or task in your project, BUT they need to be addressed to maintain good working relationships.
- State your issue in a way that it can be resolved,
- Have an owner & target date for closure
- Unresolved issues can be a MAJOR source of delays

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

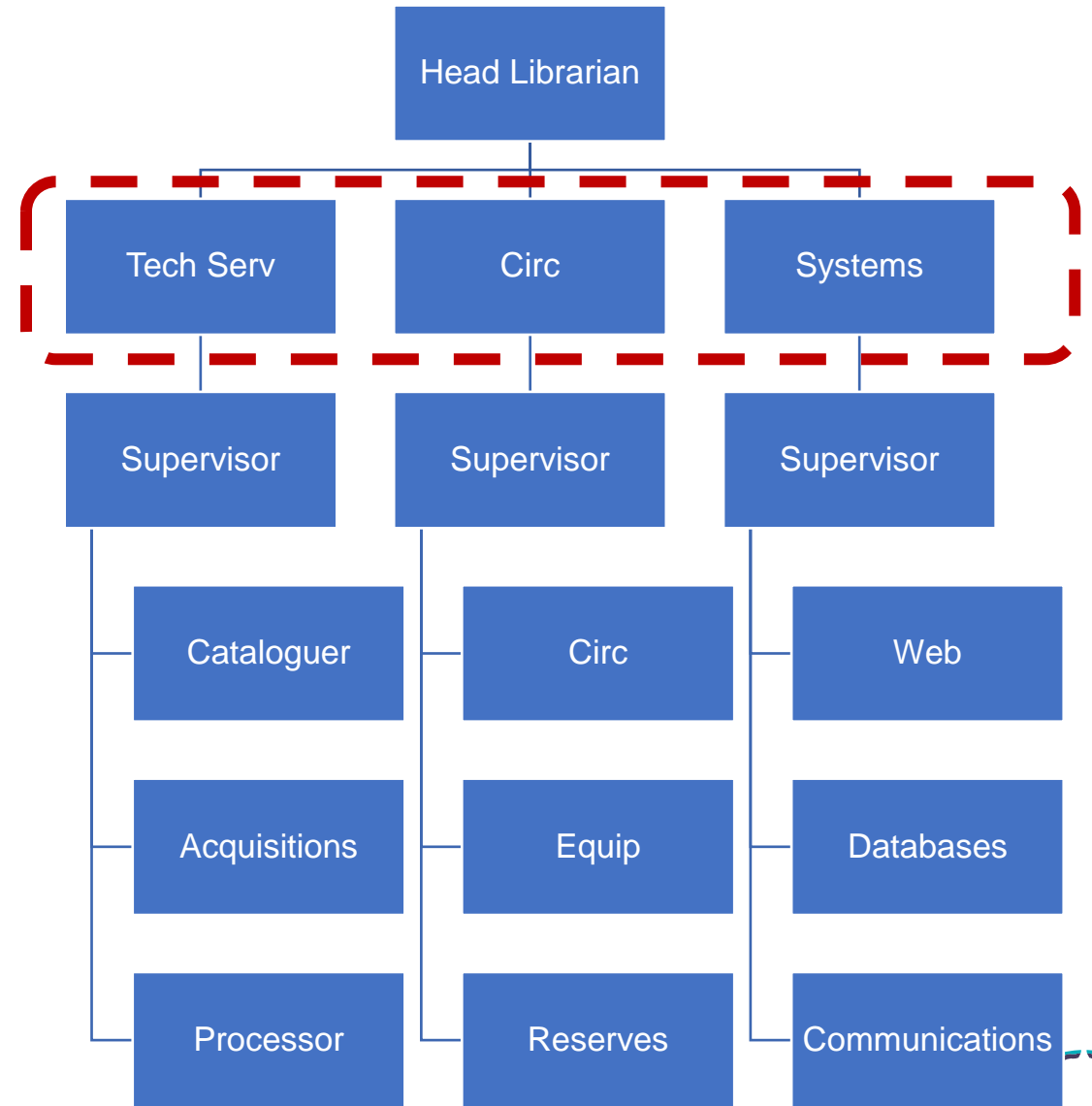


Org Structure and the PM

- If you are managing a project, what kind of control do you really have?
- Do you have:
 - Authority
 - Control of your Resources
 - Control of the Budget
 - Is this full-time, part-time, off-the-side-of-your-desk time
 - Do you have admin staff to help?

Functional PM

- Authority – **Little or None**
- Control of your Resources– **Little or None**
- Control of the Budget– **Another Mgr**
- Is this full-time, part-time, off-the-side-of-your-desk time– **Part Time**
- Do you have admin staff to help? – **Part Time**



Functional PM

ADVANTAGES

- Grouped by specialties
- Hierarchical
- Easy to manage specialists
- One reporting line for supervisors

DISADVANTAGES

- Coordinator not manager and therefore less authority
- Standard work is higher priority than project work
- No PM career path for you

How to keep people on task

Or how to adjust your expectations as a manager

- What are your team's priorities
- How do you motivate or reward them
- What other factors are going on for them right now
- What self-reflection have YOU done to consider your management style?

Remember

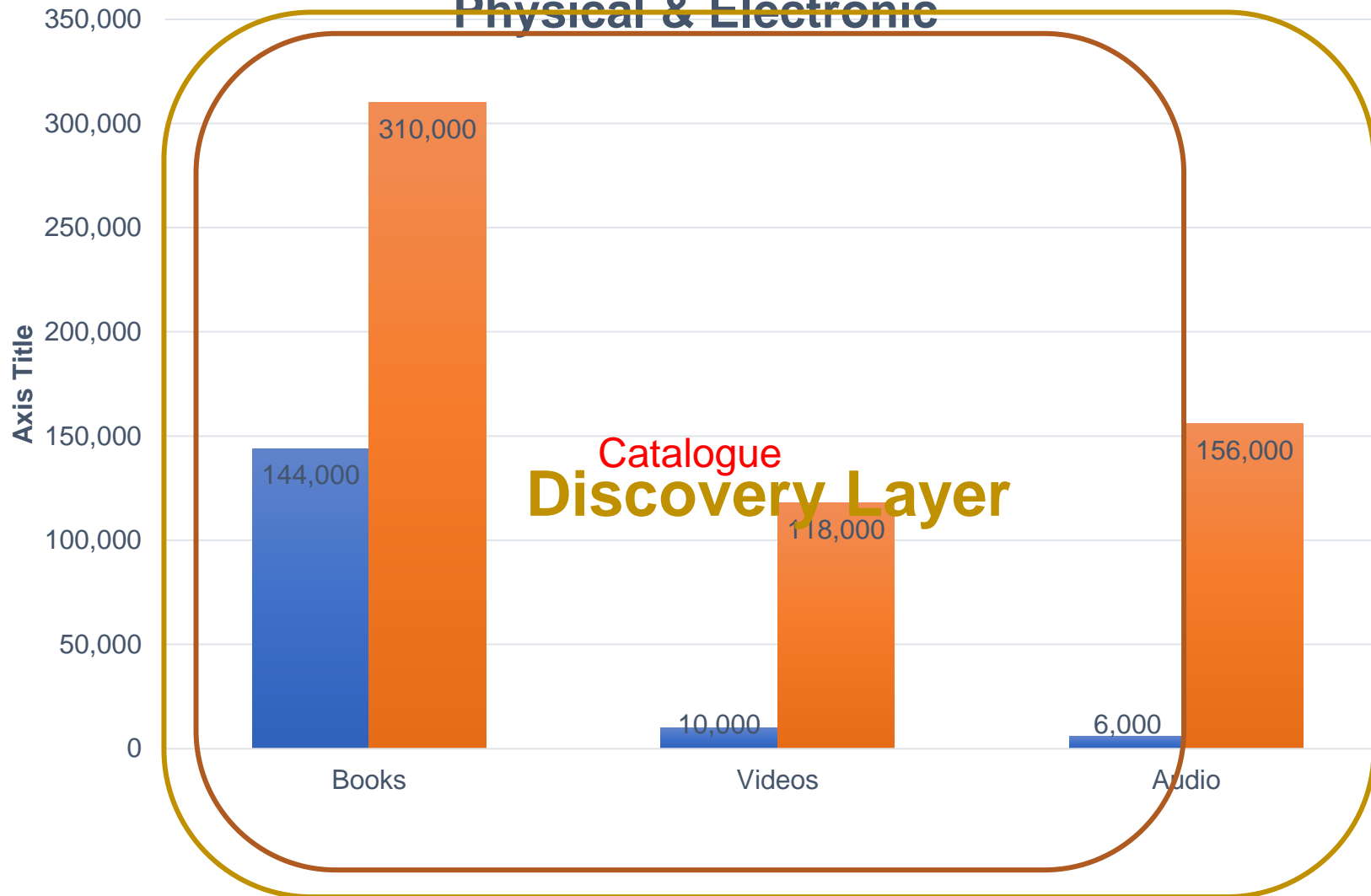
- Talk to people directly instead of email (Zoom)
- Determine your authority & advocate for other team members to have time to do their Project Work
- Be kind

Example

The Problem

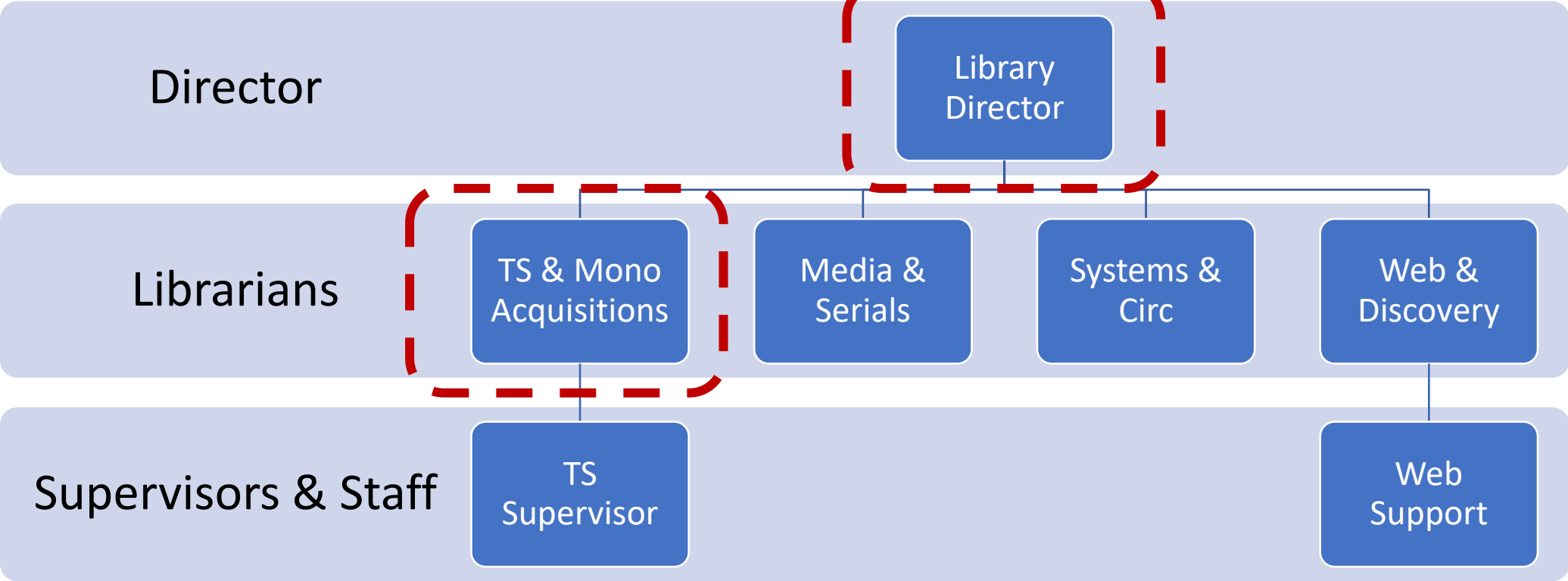
- Hard to locate streaming videos
- Vendor Records poor quality
- Authority Records are compromised (just finished a MARCIVE project)
- Records need to be purged to keep everything current
- More Digital collections Covid
- More Vendors means more staff time

Library Collection; Physical & Electronic



Simple Idea

- Position the Discovery Layer as our main search interface
- Keep the catalogue for **owned** items – even owned eBooks
- Move **leased** items into Discovery Layer



Lessons Learned

Project Manager with Authority

Weekly Meetings – 1 h on Teams

Shared Meeting notes in a single Word Doc

Takes time for the group to normalize

Simple changes can effect multiple people

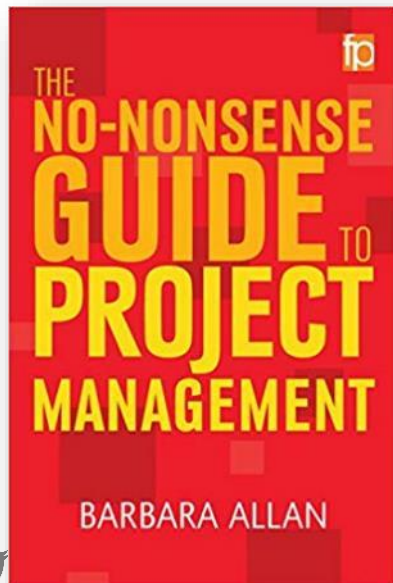
Books

PMP Books

Library specific

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

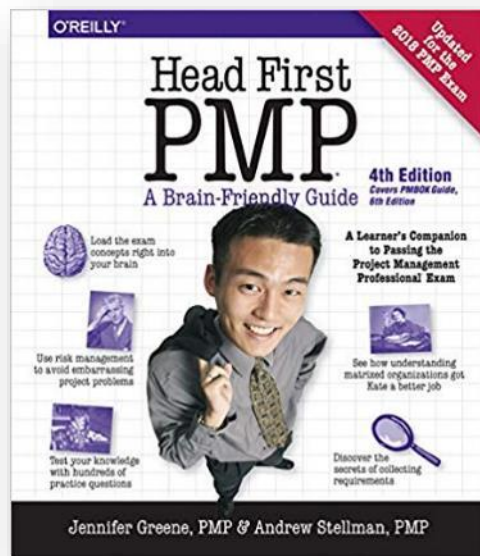
- Project Management in Libraries: On Time, on Budget, on Target
- Carly Wiggins Searcy
- <https://www.alastore.ala.org/content/project-management-libraries-time-budget-target>



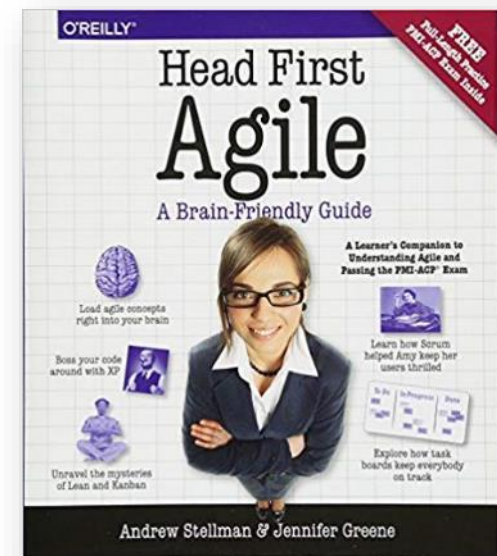
PMP Books

General and interactive

- Head First PMP: A Learner's Companion to Passing the Project Management Professional Exam
- Jennifer Greene, Andrew Stellman



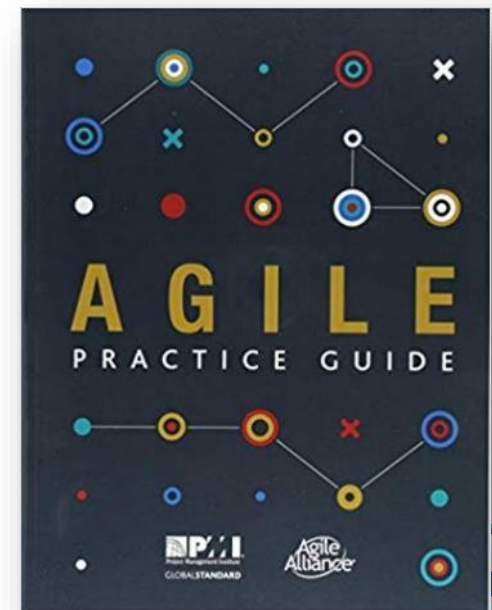
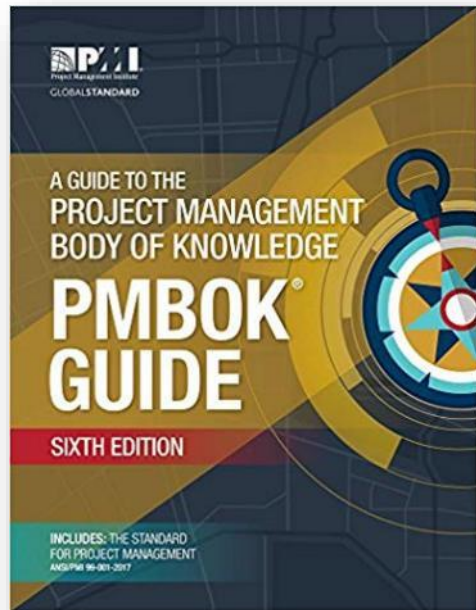
- Head First Agile: A Brain-Friendly Guide to Agile Principles, Ideas, and Real-World Practices
- Jennifer Greene, Andrew Stellman



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

Questions?