Multiple Project Management at Academic Libraries

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Table of Contents

Introduction 1

Background: A Need for Project Management 2

The New Challenge: Multiple Project Management 3

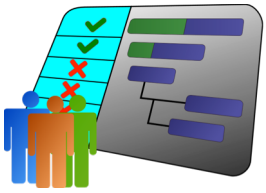
- **Challenge 1: Unclear Requests** 4
- **Challenge 2: Prioritization** 4
- **Challenge 3: Limited Resources** 5
- **Challenge 4: Varying Degree of Project Management Expertise** 5
- **Challenge 5: Communication** 6

Multiple Project Management Tools and Strategies: Tailor to Your Institution's Needs 6

- **Strategy 1: Choose a Project Management Structure (Formal or Informal)** 6
- **Strategy 2: Cultivate Organizational Support** 7
- **Strategy 3: Align Projects to Organizational Goals** 8
- **Strategy 4: Adapt Methodologies** 8
- **Strategy 5: Choose the Right Tools for the Job** 9

Conclusions 10

Introduction



Project schedule: http://openclipart.org/detail/121699/project-schedule-by-jabernal

Academic libraries embody a highly dynamic and technology-rich environment, where it is usual to have more than one technology based project occurring simultaneously. Adoption of project management methodologies can help reduce the time and cost of a project. Increasingly, at the institutional level, multiple technology projects compete for time and resources, which very often results in new projects dragging on and on for lack of clear prioritization and dedicated resources, and managers asking already maxed-out staff to do more multitasking. Methods and tools for multiple project management can help administrators properly plan, select and prioritize projects within an academic library, ensuring strategic alignment and a high rate of project completion. While formal methodologies offer some advantages, institutions should tailor their approach, choosing tools and strategies which best fit their organization's needs and budget for project management, avoiding the risk of having to "manage the management" of projects (Ramirez).

Background: A Need for Project Management

"Technology continues to drive much of the futuristic thinking within academic libraries" (ACRL 314).

Among the "2012 Top Ten Trends of Academic Libraries" identified by the ACRL Research Planning and Review Committee (311), three are technology-related: digital preservation, information technology and mobile environment. OCLC Research has surveyed 169 research libraries in the United States and Canada with special collections and reported that 97% have "completed one or more digitization projects and/or have an active program" (Dooley and Luce 54). Information technology continues to be the driving force of "the futuristic thinking within academic libraries" with users' desire for information and access to social media 24 hours a day and 7 days a week, acceptance and adoption of cloud computing, more value placed on collaboration, online and hybrid learning and a new emphasis on challenge-based and active learning (Johnson, Adams and Cummins). As mobile devices are changing the way information is delivered and accessed, an increasing number of libraries provide services and content delivery to mobile devices (ACRL 314).

"Web project management in libraries continues to be informally defined and has not yet found a consistent home within organizational charts" (Fagan and Keach 1).

With many technology projects underway and more on the go, most academic libraries are trying hard to cope with project management needs. However, many academic libraries manage their projects with a less rigorous and more informal approach. An investigation on how Ontario libraries manage their projects reported that most libraries have not "overwhelmingly embraced a formal approach to project management" (Horwath 12-13), especially with smaller library projects, where approaches are often informal and ad hoc. Another study (Fagan and Keach) also found that academic libraries are very inconsistent about project management (PM) positions, organizational structures, team definitions and PM practices. If we look at IT projects management in general, many IT firms are adopting formal PM methodology to reduce the risk of project failure resulted from insufficient planning. They turn to PM to boost efficiency, cut costs, and improve on project delivery in terms of time and budget. IT project managers are brought in to manage project activities so as to meet customer expectations within an agreed time frame and

"Project management may be viewed as a means to a responsible end for the planning of projects in libraries" (Massis 529).

within budget constraints (Kumar).

While the number of technology projects in academic libraries has been increasing in the context of reduced resources and funding, more and more academic libraries show strong interests in formal PM management techniques to try to do more with less. Those few that have taken the stride to adopt a formal project management process have found that formal PM methodologies within academic libraries are "not only beneficial but necessary" (Stanley, Norton, and Dickson 70-83). Benefits of using a formal PM approach identified by these academic libraries include: clear identification of deliverables, ease of managing projects, better definition of roles and responsibilities, "a more cooperative and collaborative work environment because of the introduction of a project management method" (Kiel 11), a solution to less internal resources and unrelenting technological change (Anzalone 53-70), a systematic and transparent process of developing and deploying new technological innovations (Char 59-63).

The New Challenge: Multiple Project Management

Challenges of project management in general at academic libraries have been explored in the literature. Following are the challenges commonly discussed:

- Establish a consistent and effective framework for project management that can be used for future projects.
- Define a project including its scope and deliverables.
- Deal with shifting and unclear priorities.
- Clarify the leadership role, defining who has authority to make a final decision.
- Assemble a project team within available staff, budget, and other resources.
- Foster communications and information exchange among stakeholders.

Moreover, because information technology (IT) is key to the operations of an academic library, a new project at an academic library is likely to have an IT component and requires the expertise of systems librarians. Consequently, the library's IT unit receives a never-ending stream of project proposals and needs to manage multiple projects in parallel, and the management of multiple projects comes with its own set of challenges (Ramirez).

Challenge 1: Unclear Requests

A project proposal does not always specify project parameters including, scope, timeline, objectives, milestones and deliverables. In the context of multiple project requests, these parameters need to be clarified so that available resources can be negotiated and allocated among projects (Ramirez). Moreover, it is crucial to decide when a project is considered complete, and according to which factors the success of a project is measured. This ensures that there will be a closeout meeting where the project members can discuss and record successes, issues, and lessons learned from the complete project (Feeney and Sult 754). The outcome from a closeout meeting can help inform how a centralized system can add consistency and effectiveness to the management of future projects. Furthermore, it is not always clear how projects are transitioned into production services (Vinopal 388), and how such new services will be managed throughout their lifecycle.

Challenge 2: Prioritization

Microsoft Clip Art

Due to increasingly limited resources at academic libraries, upper administration needs to prioritize projects according to the organization's strategic plans. However, this step may be complicated by the organizational politics and shifting priorities (Fagan and Keach 12). It becomes more difficult to prioritize projects if it is not clear who has authority to make a final decision. Not many academic libraries have a centralized project management system with support from upper administration. Without a centralized system, it's hard to manage and prioritize project proposals across units, branches, and campuses. Moreover, in the absence of a centralized system, project proposals may be submitted and approved in an ad-hoc manner,

where not all project ideas can be given due consideration (Ramirez).

Challenge 3: Limited Resources

Forced to take austerity measures in the economic downturn, academic libraries do not always have adequate staffing, budget, and other resources to support all projects (Fagan and Keach 12). In the IT unit of an academic library, its limited resources are allocated to the maintenance of existing services before being assigned to new projects (Ramirez). Under this circumstance, it is challenging to assemble a project team with necessary expertise and time. A project with an IT component will likely be rejected if technological expertise requisite for the project is not available within the institution (Ramirez). Once a project team is set up, a project leader should be clearly identified, and each member should agree to follow the project leader and commit to finishing the project (Horwath 27). In case staff members are asked to work on multiple projects, management should have a system to track which staff member works on which project (Horwath 27) to avoid overextending the staff members.

"…it is clear that project management in libraries is here to stay" (Kinkus 362)

Challenge 4: Varying Degree of Project Management Expertise

Project management is a trend in general and is a highly sought-after skill in academic libraries: "Based on surveys of both librarian job ads and MLIS curricula, it is clear that project management in libraries is here to stay" (Kinkus 362). However, levels of understanding of PM can vary widely as different types of coursework in PM may be offered to staff; Ramirez notes as an example the belief that creating a Project Charter completes the project management component, although the charter is only just the beginning of PM. In the IT unit of an academic library, multiple project management is normal; yet, some staff members may be unaccustomed to working on multiple projects simultaneously. Learning a new way of working can cause stress to the individual, and strife within the unit, hampering productivity on projects. In this case, they should be trained for project and time management to handle demand for their time and expertise (Ramirez). It is also reported that staff at academic libraries have difficulty understanding how project-

based work is done differently than operational work, and that they do not fully follow project management principles such as setting priorities, meeting milestones, and communicating (Horwath 26).

Challenge 5: Communication

Communication and consensus building among stakeholders are crucial, but onerous due to conflicting opinions and different personalities. This is exacerbated in an environment where multiple projects are undertaken concurrently. Since information technology is often considered to be a solution for every problem, expectations of both staff and users regarding capacity to complete projects involving new technologies can become unrealistic, leading to an excessive number of project proposals to the IT department (Ramirez). Therefore, it is important to foster information exchange and communication among stakeholders through the project lifecycle to increase buy-in and camaraderie (Fagan and Keach 12) and to control expectations (Ramirez). After the complete project is assessed and is considered a success, the success should be communicated and "sold" throughout the organization (Ramirez).

Multiple Project Management Tools and Strategies: Tailor to Your Institution's Needs

With pressures to manage multiple projects clearly on the rise in academic libraries, due to lack of resources and the pressure to do more with less, it follows that managing multiple projects must be done in the most efficient manner possible. Looking at all projects in relation to the organization's strategic goals, and developing strategies to manage the overall flow of projects can help academic libraries meet the demands for innovation in the face of the many challenges discussed previously in this paper.

Strategy 1: Choose a Project Management Structure (Formal or Informal)

Academic libraries should consider whether or not they need a formal unit for

project management. In a larger organization, the project portfolio management (PPM) may reside within a formally created project management office. On the other hand, in smaller libraries, PPM may be the responsibility of a single staff member, manager, or group of managers (Vinopal 381). Established structures such as committees or management teams may be the logical place in which to house the PPM responsibilities, rather than investing resources into developing a new, separate office (Vinopal 384). The University of Arizona, for example, has a "Portfolio Management Group" which is a subcommittee of the library leadership "Cabinet"; this group ensures projects meet the libraries strategic goals, and prioritizes projects, project resources and activities (Feeney and Sult 750).

As Associate University Librarian in the Library Systems and Information Technology (LSIT) department, Rue Ramirez is part of the Library's executive leadership team, to which he reports regularly on the top 15 priority LSIT projects. UBC LSIT does not have a formal project management office or an established project manager position within the team. As already discussed, the whole team participates on multiple projects. Additionally, Ramirez requests a project leader be identified within the initiator's department for each project. Ramirez maintains that this informal structure meets the current needs.

"Senior management must delegate authority of the project to lower levels" (Dye and Pennypacker).

Strategy 2: Cultivate Organizational Support

As with individual projects, strategies for multiple project management may be determined by organizational culture; upper management must endorse, and staff must support the implementation (Vinopal 383). Senior management may oversee the process, but won't focus on the individual projects: "instead, senior management must delegate authority of the project to lower management levels" (Dye and Pennypacker). Therefore, it is still important for individual library departments to build capacity in project management as Fagan and Keach have suggested (20). The UBC Library Systems and Information Technology department, while they may not all have formal project management training, all work with a strong project management ethic, understanding that they may not have the chance to focus on one

project at a time. However, an attempt at balance is struck; every few months the team attends a "hack day" at which they can focus on investigating applications outside the usual project realm, which have been chosen by vote (Ramirez).

Strategy 3: Align Projects to Organizational Goals

In multiple project management, a focus should be placed on linking all projects to the goals of the department or institution, in order to prioritize projects and resources. In her recent, comprehensive article, "Project Portfolio Management for Academic Libraries, A Gentle Introduction" Jennifer Vinopal introduces how project portfolio management (PPM) links projects together, but also back to the organization's strategic goals:

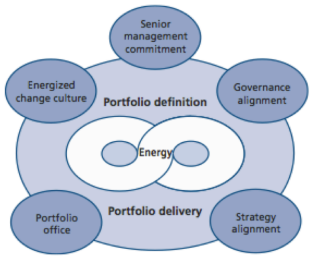
PPM is an ongoing process by which management can ensure, in an organized and ongoing way, that: 1) the project work of the organization supports the strategic vision and direction of the organization; 2) the set of active projects represents the highest priorities of the organization; 3) there are enough resources available to accomplish all the project work at hand; and 4) there are procedures that can be enacted to correct course when problems are discovered in portfolio alignment with strategic vision, prioritization, or resource allocation. (381)

Likewise, Ramirez ensures that all UBC Library systems projects are analyzed and prioritized according to alignment with the overall UBC Library strategic plan, which was created a year and a half ago. The stream of incoming requests for projects is "funnelled" into the department by a system (a combination of JIRA and Zendesk software), which also serves as a means of communication - IT analysts can clarify and negotiate the details of the project with requestors, and requestors can check back on the status of their request (Ramirez).

Strategy 4: Adapt Methodologies

To mitigate the challenges of multiple project management, organizations should take a strategic approach, such as those offered by the UK's P3M3 Management of Portfolios model (Vinopal 384) or the Project Management Institute's Program

Management Professional certification. However, approaches can be modified to suit the organization's specific needs. Vinopal recommends "introducing PPM to your organization gently and applying only as much or as little as needed to accomplish your goals" (380). The P3M3's Management of Portfolios (MoP) website offers best practice support tools for portfolio management as well information on how to become certified in MoP. These principles, practices and cycles can be tailored into "an appropriate portfolio management roadmap" specific to the organization (Kilford 2).



UK's Management of Portfolios (MoP) model (Kilford 3).

Ramirez acknowledges that there is no single prescribed methodology used; every organization and every project is different. UBC Library IT projects are assessed to determine the level of project management required for each one; it is not always necessary or efficient to use the complete, formal project management approach for shorter projects (Ramirez).

Strategy 5: Choose the Right Tools for the Job

Tools as well should be determined by organizational needs; a balance must be struck between functionality and cost. Vinopal found that for her organization, software such as Microsoft Project Server, while offering increased abilities to track and analyze project data, was too expensive and, she states, "too 'corporate' for our needs" (386). She notes that actually, her digital initiatives department uses tools different from her institution's IT department; Google spreadsheets suffice for tracking project data across different groups of projects while being reducing administrative expenditures, as the software is freely available online (386). Ramirez agrees that purchasing and implementing software can be "overkill"; other than the software tools used to accept project requests, his staff have access to Microsoft's Project Management suite, from which they may choose to use individual tools as needed for individual projects, but they do not have a more expensive, enterprise level option such as MS Project Server. The University of Arizona Portfolio Management Group uses an evaluation system they created, consisting of "Six Questions" and a scoring process to prioritize projects; this tool

has contributed to the library's project completion rate of 90% (Feeney and Sult 751).

Managing multiple projects may not require expensive, "corporate" software. (Photo: K. Buschert)

Conclusions

In an academic library, the type of project management structure established will depend on the degree of multiple project management required. If the library engages in only a few complex, multi-year projects, then creating a formal unit or position for project management may not be necessary or justifiable. After a project management structure, either formal or informal, is established, support for project management principles and practices should be cultivated throughout the organizational structure, both from the upper management and from the staff. The project management structure should also help the library prioritize projects in accordance with its strategic plans to maintain consistency and transparency in decision-making. Lastly, as the depth of project management required varies from project to project and from institution to institution, the library should adapt methodologies and tools for project management based on its current project management needs. An enterprise project management tool such as Microsoft Project Server is not the best solution for every academic library. While "project management" is quickly becoming the latest catchphrase in academic libraries, administrators need to expand their view to look at all projects *en masse*. Formal portfolio project management structures and methodologies offer many useful tools and strategies; however, each academic library, or each project may require a different approach.

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