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Project Management: A Library Perspective

Becky Skeen
Utah State University

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Project Management: a Library Perspective

Becky Skeen
Special Collections Cataloging Librarian
Utah State University
becky.skeen@usu.edu

OLAC Conference 2020
Agenda

- Basic terminology and concepts
- Project life-cycle phases
  - Initiation
  - Planning
  - Executing
    - Monitoring and Controlling
  - Closing
- Application/Conclusion
What is Project Management?

Project Management Institute (PMI)
- Set standards for project management field
- Provide certifications
- *A Guide to the Project Management Body of Knowledge (a.k.a. PMBOK Guide)*

Project management
- Application of knowledge, skills, tools, and techniques to project activities to meet the project requirements (PMBOK, 2004)

Project
- A temporary endeavor undertaken to create a unique product, service, or result (PMBOK, 2004)
Reflection exercise – What are some benefits you see to using Project Management?

Gives structure to a project through

- Setting clear goals
- Providing precise documentation of processes, workflows, budgets, and needed resources
- Defining individual tasks and responsibilities
- Easily tracking progress and reporting anomalies
- Providing clear communication paths
- Avoiding scope creep
- Showing distinct outcomes of the project and timeline to accomplish them
- Providing an effective plan to increase buy-in by administration and other stakeholders
Triple Constraints of Project Management

3 main constraints of a project

- Cost
- Time/Schedule
- Scope/Quality

- Try to balance the three
- May be changed or refined as project progresses
Party Project

- **Cost**
  - We have $700 for the party

- **Time/Schedule**
  - The party is going to be in 6 weeks

- **Scope**
  - 30 guests
  - Party in backyard
  - At 5pm
  - Serve dinner and dessert
  - Play 2 party games
  - Music and dancing
  - Decorations – balloons, tables chairs, tablecloth and streamers.
3 additional Project Constraints – PRINCE2 (Siegelaub, 2007)

- Quality
  - “focuses on characteristics of a deliverable”
  - “to assure that a particular characteristic is present and working properly (quality checking)”

- Benefits
  - “Benefits represent the value the project is expected to deliver to the organization.”
  - have “a clear justification, with measurable, agreed benefits …”

- Risk
  - Risk are identified and managed
  - Both opportunities and threats
Party Project

- Quality
  - All party attendees participate in at least one activity
  - No one gets food poisoning
  - 50% of the people dance

- Benefits
  - Show appreciation for the guest of honor
  - Build friendships

- Risks
  - Guests – not all show up or too many
  - It rains the day of the party
  - Accident on road delays people’s arrival
  - Caterer cancels last minute
  - DJ gets sick and can’t come
  - Decorations get back ordered.
Reflection exercise - Why do projects fail or succeed?

Fail

- Scope creep
- Cost increases
- Unforeseen circumstances
- Poor coordination
- Failure to meet expectations

Succeed

- Good communication
- Stakeholder buy-in
- Well defined scope
- Extensive advanced planning
- Quality in work
# Skills of a Project Manager

## Hard Skills
- Managing technical/subject issues
- Planning
- Measuring performance
- Monitoring quality
- Analyzing risk

## Soft Skills
- Communicating
- Negotiating
- Leadership
- Problem solving
- Managing change
- Conflict resolution
- Delegating
- Thinking globally
Applying what we have learned so far:

- Think of an example when 1 of the constraints changed in a project you were working on and how did that impact the other constraints?
  - How was the change handled?
  - How would you handle this situation in the future?

- What skills do you think are most important for a project manager?
Project constraints

- Cost
- Time/Schedule
- Scope
- Quality
- Benefits
- Risk
Project Life Cycle

- Initiation
- Planning
- Execution
  - Monitoring and Controlling
- Closure
Phase 1: Initiation

- Identifying benefits
  - Building a business case
  - Determining feasibility

- Involving stakeholders

- Creating a Project Initiation Documentation

- Utilizing organizational resources
  - e.g. Appointing the project team and manager

- Reviewing the project and gain approval for the next phase.
Building a Business Case

Things to consider (these will be unique to your organization)

- Encourage objectivity
- Align with organization’s strategic intent
- Use of quantitative tools – e.g.
  - Measurable performance measures
    - Cost/resources
    - Data available for review
- Use of qualitative tools – e.g.
  - Stakeholder bias
  - Organizational fit
  - Risk analysis
Building a Business Case - continued

Needs Assessment

- Needs separate from wants
- Resolve conflicting needs
- Sponsor/recipient may not know or understand their needs
- Needs should be assessed
  - Document/literature reviews
  - Interviews
  - Audits
Stakeholders

- Who benefits from project
- Who provides input and/or oversight
- Who has related responsibilities

Examples
- Project sponsor (usually an administrator or executive)
- Organization’s systems, culture, etc.
- Economical and social factors
Project Initiation Documentation

Includes documentation such as a

- **Project Charter**
  - “a document issued by the project initiator or sponsor that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources to project activities.” (PMI, 2005)

- **Approved by administration**
  - Ensure commitment to project constraints defined so far
    - Scope, schedule, quality, benefit
Party Project

- **Identifying benefits**
  - Celebrate someone’s accomplishments and build friendships
  - Celebrate notable events/achievements (culture)
  - Allocated resource based on importance of the event and available funding

- **Involving stakeholders**
  - Talk with the honoree about having the party
  - Talk to attendees – availability, preferred activities, etc.
  - Talk to family about having the party in the backyard

- **Use of organizational resources**
  - Identified what resources we already have and funding for additional supplies and services.
Applying what we have learned so far:

- What factors did you use to develop your business case for the last project you worked on?
- Did you separate out wants from needs when scoping the project? Why would this be a good idea?
- Did you develop a comprehensive list of project stakeholders?
- Did you use a project charter or similar for your last project? If so, what were the benefits? If not, do you plan to on your next project?
Phase 2: Planning

- **Scope**
  - Further refinement
  - Risk identification and management

- **Resources**
  - Budget, staffing

- **Time**
  - Schedules

- **Communication**

This work is documented in the Project Management Plan.
Project Management Plan (PMP)

Development of the Project Management Plan “...is the process of defining, preparing and coordinating all subsidiary plans and integrating them into a comprehensive project management plan. The key benefit of this process is a central document that defines the basis of all project work.” (PMBOK, 2013)
Project Management Plan (PMP)

1. Scope Statement
2. Critical Success Factors
3. Deliverables
4. Work Breakdown Structure
5. Schedule
6. Budget
7. Quality
8. Human Resources Plan
9. Stakeholder List
10. Communication
11. Risk Register
12. Procurement/Acquisition Plan
1. **Scope Statement**
   
   1. “...[A] fundamental responsibility of a project manager, to know and maintain the boundaries of the project.” (Roseke, 2020)

   - **SMART**
     - Specific
     - Measurable
     - Achievable
     - Relevant
     - Time-constrained
Project Management Plan (PMP) – continued

2. Critical Success Factors – criteria list
   ▫ Deadlines, Budget, Quality standards
   ▫ End user benefits, Minimal change orders, quality production, Employee satisfaction

3. Deliverables
   ▫ Deliverables are the products, services, or results that the project was commissioned to produce

4. Work Breakdown Structure
   ▫ A deliverable-oriented breakdown of a project into smaller components (PMBOK)
5. Schedule
   ▫ External stakeholders often determine the deadline dates
   ▫ A schedule can be set manually

6. Budget
   ▫ Use the budget identified in the project initiation documentation

7. Quality
   ▫ What are the quality standards for your project?
     ■ Determining quality standards
     ■ Developing a strategy to meet the standards (QA)
   ▫ Measuring quality (QC)
8. Human Resources Plan
   ▫ Resource Requirements
   ▫ Project Team Acquisition
   ▫ Training and Development
   ▫ Management

9. Stakeholder List
   ▫ It is easy to forget someone
   ▫ Develop and manage a Stakeholder list

10. Communication
    ▫ Poor communication makes issues on a project worse
    ▫ Lack of communication maybe the only reason an issue arises
11. Risk Register
   ▫ Prepare for the unexpected
   ▫ Create and maintain as risk register
     ■ Description of risk, Probability, Impact, Priority, Triggers, Response plan

12. Procurement/Acquisition Plan
   ▫ What outside products and services are required?
   ▫ How will they be procured?
   ▫ How is progress and quality monitored?
   ▫ Management becomes a more important issue
# Party Project

<p>| | |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Scope Statement</strong></td>
</tr>
<tr>
<td></td>
<td>▪ Party to celebrate friend</td>
</tr>
<tr>
<td>2.</td>
<td><strong>Critical Success Factors</strong></td>
</tr>
<tr>
<td></td>
<td>▪ People have fun</td>
</tr>
<tr>
<td>3.</td>
<td><strong>Deliverables</strong></td>
</tr>
<tr>
<td></td>
<td>▪ Party happens</td>
</tr>
<tr>
<td>4.</td>
<td><strong>Work Breakdown Structure</strong></td>
</tr>
<tr>
<td></td>
<td>▪ Assigned family members and friends tasks</td>
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<tr>
<td>5.</td>
<td><strong>Schedule</strong></td>
</tr>
<tr>
<td></td>
<td>▪ Set party date, know when to place orders or hire help</td>
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<tr>
<td>6.</td>
<td><strong>Budget</strong></td>
</tr>
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<td></td>
<td>▪ Available funding and resources set aside for party</td>
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<tr>
<td>7.</td>
<td><strong>Quality</strong></td>
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<td></td>
<td>▪ All party attendees participate in at least one activity, No food poisoning, etc.</td>
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<td>8.</td>
<td><strong>Human Resources Plan</strong></td>
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<td>9.</td>
<td><strong>Stakeholder List</strong></td>
</tr>
<tr>
<td></td>
<td>▪ Honoree, family, friends, etc.</td>
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<tr>
<td>10.</td>
<td><strong>Communication</strong></td>
</tr>
<tr>
<td></td>
<td>▪ Invitations, check in on status of assigned tasks, etc.</td>
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<tr>
<td>11.</td>
<td><strong>Risk Register</strong></td>
</tr>
<tr>
<td></td>
<td>▪ Have contingency plans for people being late, if it rains, etc.</td>
</tr>
<tr>
<td>12.</td>
<td><strong>Procurement Plan</strong></td>
</tr>
<tr>
<td></td>
<td>▪ We hired a caterer and a DJ</td>
</tr>
</tbody>
</table>
Applying what we have learned so far:

- For projects that you have worked on, how many of the Project Management Plan items did you cover? How would the inclusion of missing or poorly covered items have improved project management for the project?

<table>
<thead>
<tr>
<th>PMP components:</th>
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<td>Budget</td>
<td>Procurement Plan</td>
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</tbody>
</table>

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Phase 3: Execution

Project Manager’s responsibilities during this phase (Kissflow, 2020)

- Following scope defined in Project Management Plan (PMP)
- Manage team’s work
- Manage changes including corrective actions
- Manage communication (internal and external)
- Celebrate milestones
- Hold status review meetings
- Document changes in PMP
Monitoring and Controls

- Project control is a “project management function that involves comparing actual performance with planned performance and taking appropriate corrective action (or directing others to take this action) that will yield the desired outcome in the project when significant differences exist.” (PMBOK)
Project Control Process Focus

- Measuring planned performance vs actual performance.
- Ongoing assessment of performance to identify preventive or corrective actions needed.
- Keeping accurate, timely information based on the output and documentation.
- Providing information that supports status updates, forecasting and measuring progress.
- Delivering forecasts that update current costs and project schedule.
- Monitoring the implementation of any approved changes or schedule amendments.
Party Project

- Following scope
  - Focus on honoree, inviting guests, and identifying party activities

- Manage team’s work
  - As the organizer you check in with those who are helping prepare for the party

- Manage changes including corrective actions
  - Change party decorations due to backorder; make arrangements for new party location due to rain

- Manage communication (internal and external)
  - Manage RSVPs, share changes to party with guests

- Hold status review meetings
  - Party planning team goes for coffee/hot chocolate weekly to share progress status
Applying what we have learned so far:

- For a project that you have worked on, how did you or the project manager manage the work identified to complete the project?
- How effective was the communication on the last project you worked on? How could it have been improved?
- How was quality verified on the project in your organization?
Phase 4: Closing

“The Project Closing Process Group consists of those processes performed to conclude all activities across all Project Management Process Groups to formally complete the project, phase, or contractual obligations. This process group, when completed, verifies that the defined processes are completed within all of the Process Groups to close the project of phase, as appropriate, and formally establishes that the project or project phase is complete” (PMBOK, 2013).
Summary of Closing Phase according to PMBOK (Aziz, 2015)

1. Assurance that all the work has been completed
2. Assurance that all agreed upon project management processes have been executed
3. Formal recognition of the completion of a project—everyone agrees that it is completed
Additional Actions to Consider During Closing

4. Obtain approval by the project's sponsor(s) (whether internal or external) for the work.

5. Review whether or not all organizational governance processes have been executed.

6. Assessing whether or not the necessary project management processes have been applied.

7. Administrative closing of all procurements and that both parties have completed their contractual obligations.
Addtional Actions to Consider During Closing

8. Formally recognize completion of project and transition to operations.
9. Validate that the project achieved benefits identified in the business case.
11. Disbanding project resources.
12. Transition project deliverables to the customer/sponsor organization in a manner that warrants seamless operations and support.
Party Project

Assurance that all the work has been completed, and formal recognition of the completion of a project—everyone agrees that it is completed

- We know the work was done because the party occurred as planned. Administrative closing of all procurements and that both parties have completed their contractual obligations.
- After the party Project Manager paid the caterer and DJ because the served the food and provided music per agreement.

Capture of lessons learned

- We had a follow up with party planning team to determine what went well and what didn’t so that the next party will be better!
Applying what we have learned so far:

▪ How did you or the project manager of a project you worked on ensure that the project work was complete and/or acceptable deliverables were provided? How was the project accepted?

▪ Why is it important to formally recognize completion of a project and transition deliverable over to operations?

▪ Does your organization collect lessons learned from projects? Why would this be beneficial?
Conclusion

- Example of a Project Charter from USU Libraries
- Example of monitoring and tracking through regular meetings at USU Libraries
- Some tools used by USU Libraries for different aspects of project management
  - Airtable (statistics & analytics)
  - Confluence (workflows & procedures)
  - Slack (communication)
  - Box (documentation)
References

  https://www.apm.org.uk/resources/what-is-project-management/what-is-a-business-case/


References - continued


- Kissflow, Inc. (2020, September 8). 7 Steps to Ace the Project Execution Phase. https://kissflow.com/project/project-execution-phase/


References - continued


Thanks!

ANY QUESTIONS?

You can find me at:
becky.skeen@usu.edu