Are We There Yet? Rev Up Your Productivity With Project Management Tools!

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Abstract

Librarians struggle with how to navigate, manage, track progress, and collaborate on projects. The workshop leaders shared standards and best practices from the project management industry to frame the discussion and make suggestions on how to address these issues. Workshop leaders and attendees examined current project management practices at their libraries. Attendees brought ideas for projects at their libraries that could use some management help and learned tips on selecting and implementing appropriate tools to fit their needs. Attendees participated in hands-on activities to shift gears at their libraries and maximize productivity. The session concluded with a technology showcase that allowed attendees to begin working with a variety of web applications. Workshop leaders focused on simple, free or low-cost project management web applications, such as Trello, Basecamp and Asana.

Introduction

The inspiration for this workshop came out of a conversation among the workshop leaders during the 2013 Statewide California Electronic Library Consortium Research Day. Hanson and Adams, librarians from Golden Gate University, presented a poster evaluating project management software. Tweet and Pischke, librarians from William Jessup University, shared that they were also using project management software in their library. They realized that they shared an enthusiasm for the advantages of project management software and principles. The workshop leaders had noticed a dearth of project management tools and experience in libraries, and thought they could share their learning process with the library community.

William Jessup University Case Study

The William Jessup University librarians began their project management journey by accident. Their Evergreen consultant introduced them to Trello during an ILS upgrade. The upgrade team used it for communicating about testing and bug tracking. Half a year later they started to use Trello for gathering ideas and planning events. At this point they were not committed to the software, but Trello required little buy-in from stakeholders because it is easy to learn and costs nothing.

They started to use Trello as a project management tool when they had seven different technology projects to implement simultaneously (EBSCO Discovery Service, Camino, LibGuides, EBSCO Academic Ebooks, EBSCO LinkSource, EBL patron driven loans/acquisitions, and GetItNow). Out of desperation they started learning about project management principles. As a result, they developed workflow procedures for Trello and started assigning one individual to each task. Since all of a project's tasks are visible to every member it allowed each team member to know where the project stood at any moment. Everyone also knew what their next task ought to be. The increased transparency decreased the need for meetings and email while speeding the completion of each of the seven projects.

Golden Gate University Case Study

Golden Gate University librarians became aware of project management principles and software through the project management courses offered on their campus. When they had a new website redesign project to complete, they decided it was a good opportunity to incorporate the use of project management software. Previous projects had used a variety of email, wiki, blog, intranet, and shared network solutions to store project-related files and communication, and often people were not sure where to look for information.

As a side task of the website project, the librarians evaluated a variety of project management software options using a matrix of technical requirements they had developed. Members of the website project decided to use Basecamp because of its ease of use, calendaring, task management and file attachment functionalities. The use of project management software helped greatly in the organization or the project, communication among team members, and accountability for individual tasks.

In addition to using the software, project members decided to incorporate some principles and best practices of project management. They created a project charter with a mission, goals, scope and methods. They determined the required tasks, assigned responsible individuals to tasks, and set due dates for each task with Basecamp. The timeline for this project was relatively short, so the increased organization and accountability of these project management principles helped result in a timely and successful completion.

Basecamp was a good fit for that project, but librarians at Golden Gate University Library have continued to test additional project management software for other purposes. Adams has experimented free alternatives to Basecamp that don't require subscription costs. Hanson has since moved to another institution, where she has introduced the use of Basecamp along with a couple of other free project management solutions.

Project Management Principles & Best Practices

A project is work that has a defined beginning, end, and goals. Project management is different from operations management which has defined goals, but does not have a defined ending. Project management is a set of tools to help allocate and track resources so that a project can be completed successfully, on time, and on budget. As a project begins, there will be a lot of uncertainty. Predicting the future is impossible, but it is important to clarify the project as much as possible so that you will know if it is completed successfully. This is best accomplished using a written project charter (see Appendix 1). The charter should accomplish the following tasks:
   • Define success with goals and stakeholders.

- Define deadlines in relative or calendar terms.
- Define resources (budget, personnel, and equipment).
- Define what happens to the resources and deliverables when the project is over.

Defining the project will help prevent misunderstandings between stakeholders and prevent scope creep, which is what happens when the project is changed slowly through many small decisions. The written charter provides an anchoring point. If any one of the defined parameters changes, then the others must adjust to compensate. For example if you shorten the deadline, then you must expand the resources or shrink the goals otherwise you will not be able to complete the project successfully, on-time, and on-budget.
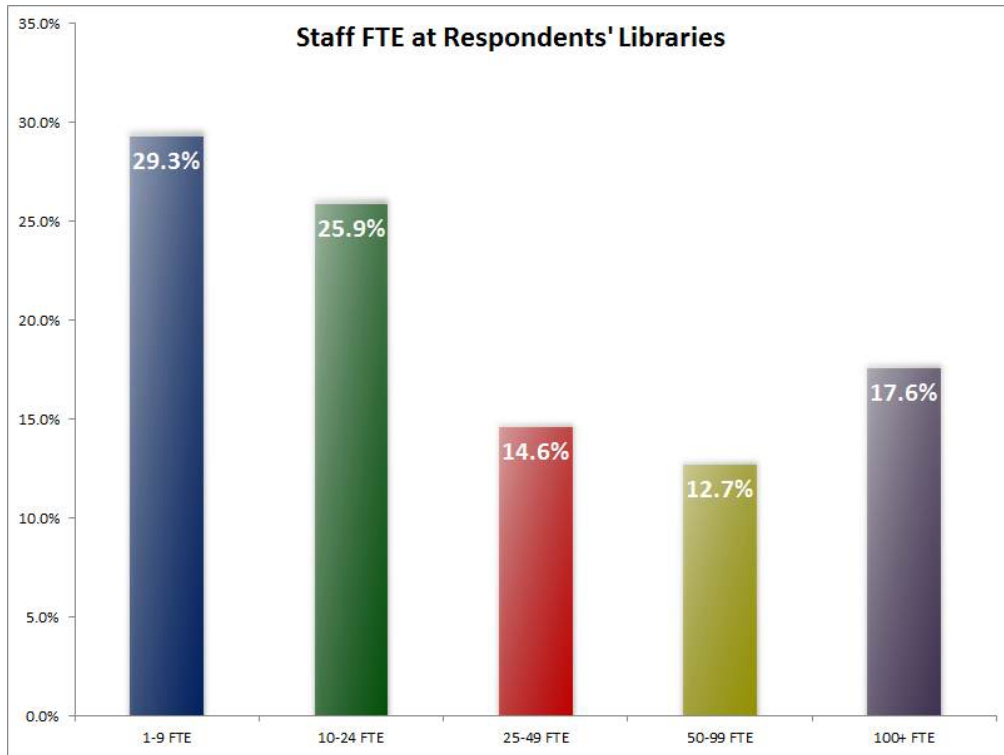
Once the project is defined, the necessary resources must be allocated and managed. There are three types of resources: time, personnel, and money. There are many tools and techniques that can be used to manage these resources. Money is managed using a budget and budgeting software. Time is managed using simple or complex timelines such as a Gantt Chart or Cascade chart. Personnel are managed through meetings, monitoring reports, and task allocation (see Appendix 2). Periodic update meetings can be used to manage both time and personnel (see Appendix 3).

It is helpful to think of a project as having four phases: Planning, Build-up, Implementation, and Closeout. Each is defined by what activities occur in that phase. The Planning phase looks forward, and this is when you will write up a project charter. The Build-up phase is when the needed resources are allocated. This is also when the project team is assembled and trained. The Implementation phase is where the plan is carried out. Progress is monitored through regular progress updates and changes are made to the project charter as needed. Closeout is where the project is completed, the team is debriefed, and final reports are made to all stakeholders (see Appendix 4).

Project Management Software Adoption Survey

The workshop leaders were interested to learn to what extent libraries were utilizing project management software. They developed an online survey and distributed it to the following listservs between August 23-September 12, 2013: CALIX, CALIBACA, ERIL, BayNet, New-Lib, Web4LIB, CODE4LIB, ILI, SCELC, and CCCU.

Of the 205 respondents, 69% were from academic libraries, 19% from public libraries, and 12% from special libraries. Over half of the responses came from libraries with fewer than 24 library staff (see Figure 1).

Staff FTE at Respondents' Libraries

FTE Range	Percentage
1-9 FTE	29.3%
10-24 FTE	25.9%
25-49 FTE	14.6%
50-99 FTE	12.7%
100+ FTE	17.6%

69% of respondents had never used project management software. Nonetheless, respondents did see a need for project management. Some dominant themes emerged around this. The respondents felt that they were missing basic knowledge of project management and did not know where to go. They were interested in project management software, but did not know what software would work best for their workflow. They also had concerns about the possibility of low adoption rates among other staff. Of the 23% of respondents who had used project management software, four applications were used the most. 40% had used Microsoft Project; 24% had used Basecamp; 14% had used Jira; and ten percent had used Trello (see Figure 2).

What project management software has your library used?
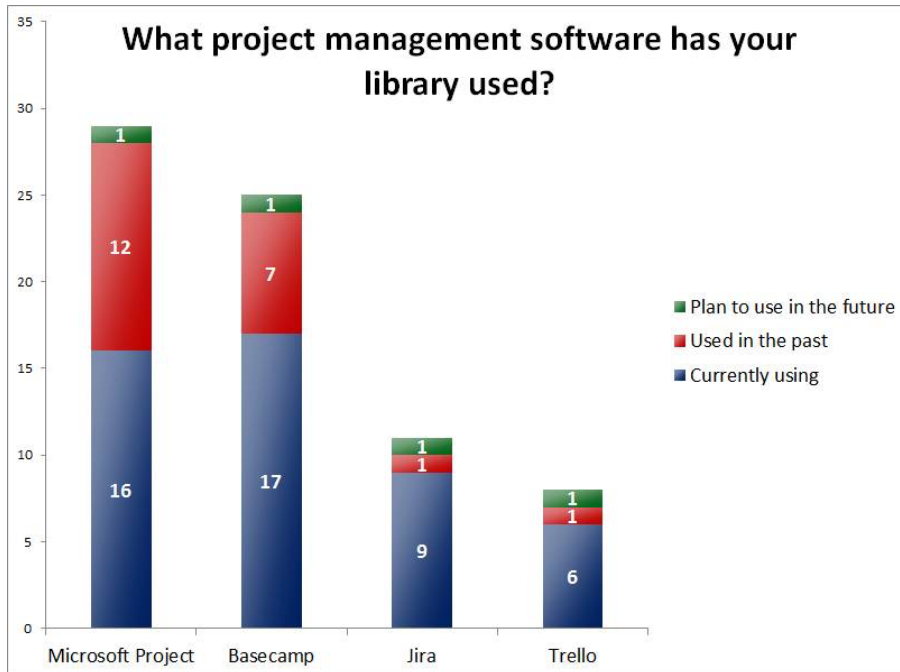
In answer to the question, "How well did the software work for your library's project(s)?" all four software types received favorable reviews. Microsoft Project was the only software that received a response of "terribly." Results were not statistically significant, because of the small number of respondents that had used project management software (see Figure 3).

How well did the software work for your library's project(s)?
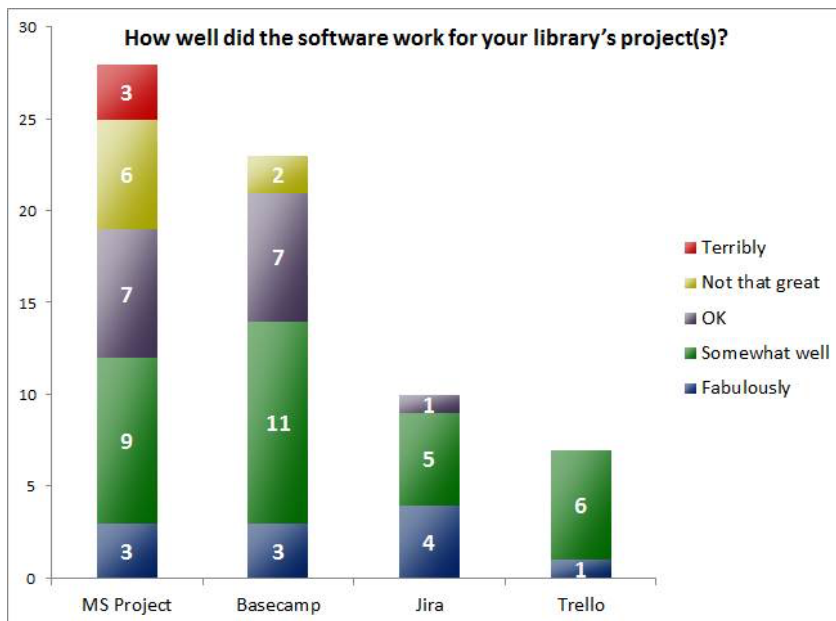
A few themes emerged from the survey about using project management software. Some librarians are trying a wide variety of project management software, and they are using it successfully. Those using project management software acknowledge that adoption and buy-in is

critical for continued success, and that incorporating project management software into daily workflow increases likelihood of adoption.

Six months after the survey closed, the workshop leaders decided to contact a few respondents who had rated their software as working "fabulously" to see if they were still using it, and what their experience with it was like. They received responses from two librarians. One librarian was using software called 10,000ft; the other was using Asana. Each librarian said that their library was still using the software. The librarian using 10,000ft said that it helped them keep track of time spent on different projects and helped them with workload planning, because they were able to estimate the time required for different projects. The librarian using Asana said that they were using Asana for new workflows and events. Asana enabled them to identify tasks and assign them to appropriate people, and they created templates for future event planning.

Software Selection Overview

There are literally thousands of project management and group productivity programs on the market, with several of them being free or freemium. The workshop leaders reviewed six software products and created the worksheet and the table of features found in Appendix 5. Typically, the more fully-featured the software is, the more time it will take you to learn how to use it and the harder you will have to work to get your team to adopt it. Conversely, the lighter weight software is easier to adopt and learn, but it may not have all the features you need for your particular project. The Selecting Project Management Software worksheet (see Appendix 5) will guide you through some of the steps to making a good decision and also lets you know which ones have a free trial or free version that you can test.

Recommended Reading

HBR's 10 must reads on collaboration. (2013). Boston, Mass: Harvard Business Review Press.

HBR's guide to project management. (2013). Boston: Harvard Business Review Press.

Managing projects: Expert solutions to everyday challenges. (2006). Boston, Mass: Harvard
    Business School Press.

Project Charter Worksheet

Project Title:

Project Leader:

Project Description

Justification	
Scope	
Objectives	
Success Measures	

Identify Stakeholders

Stakeholder	Role / Goals / Contributions (people, space, time, funds, etc.)

Select Team

Skill Needed	Possible Team Member

Project Constraints

Budget Limitations	
Schedule Limitations (start & complete date)	

Work Breakdown Structure Worksheet

Major Task	Level 1 Sub Tasks	Level 2 Sub tasks	Assigned Individual	Time Duration
Total Duration (hours/weeks/days)				
Major Task	Level 1 Sub Tasks	Level 2 Sub tasks	Assigned Individual	Time Duration
Total Duration (hours/weeks/days)				

Project Update Form

Project: Prepared by:

Project period (dates):

Tasks Accomplished

What	When	Person Responsible

Issues or Problems

Resolved?	Need to be Resolved?	When	Person Responsible

Budget Status

Changes to budget items?

Overall: under/over?

Tasks Coming Up

What	When	Person Responsible

Notes

Changes in objectives:

Changes in resource allocation:

Project Phase-out Analysis & Lessons Learned

Project: Prepared by:

Project period (dates):

Project Review

	What Worked	What Didn't	Ways to Improve
Major Task #1:			
Major Task #2:			
Major Task #3:			
Major Task #4:			
Achieving goals & meeting project objectives			
Meeting deadlines & final completion date			
Staying within budget			
Communicating with stakeholders			
Preventing scope creep			
Project handoff			

Resources assessment (i.e., time, people, money)

Lessons learned (key lessons that can be applied to future projects):

Selecting Project Management Software

	Question	Yes = 2 points	Maybe = 1 points	No = 0 points
A	Is your team large? >15=yes <15=somewhat <6=no			
B	Is your team asynchronous?			
C	Is your team geographically distributed?			
D	Does your team need to schedule access to specialized equipment?			
E	Does your project have a strict due date?			
F	Is there a lot of uncertainty in your in your task timing?			
G	Does your team require strict task accountability?			
H	Do you have access to PMP certified staff?			
I	Do you own or can you pay for software?			
J	Is there a lot of uncertainty in your budgeted items?			

The higher your score, the more robust your software ought to be.
- 00-06 = lightweight (i.e. Trello, Asana, Podio)
- 06-12 = medium weight (i.e. Jira, Basecamp)
- 12-20 = heavyweight (i.e. Microsoft Project)

If you scored most of your points in one of the colored blocks, that shows which resource you might need the most help managing.
- Blue = Personnel
- Yellow = Time
- Green = Money

Feature Matrix

Product/ $ per mo	Trial	Budget	Users	Projects	Files	App	Cloud	Multi-DRI	Calendar	Auto-Timeline
Asana 0/50/100	Y	N	15*/15/30	∞	N	Y	Y	Y	Y	N
Basecamp 20/50/100	60	Y	∞	10/40/100	3/15/ 40GB	Y	Y	N	iCal	N
Jira 10/50/100	30	Y	10/15/50	N/S	N/S	Y	Y	N/S	Y	N
Podio 0/9	∞	N**	5/∞	N/S**	N/S**	∞	Y	Y	N/S**	N**
Project365 58	N	Y	∞	∞	∞	Y	Y	N/S	Y	Y
Trello 0/5/50	∞	N	∞	∞	10/250/ 250mb** *	Y	Y	Y	iCal	N

N/S=Not Stated
*Free plan allows 15 user with reduced support and privacy
**Feature can be added with 3rd party apps
***File max per attachment, total N/S