2014 DLF Forum

**Cultivating a Culture of Project Management**
Tuesday, October 28, 10:45am-12:15pm
Salons 4,5,6, Georgia Tech Hotel and Conference Center

**Session Leaders**
Cristela Garcia-Spitz, University of California, San Diego
Carolyn Caizzi, Northwestern University
Ann Caldwell, Brown University
Angelina Zaytsev, University of Michigan
Cynthia York, Johns Hopkins University
Delphine Khanna, Temple University
Meghan Musolff, University of Michigan

Following the session the Project Managers Group is hosting a lunch to continue the conversation. In room: Conference 2

**Notes**
DLF PM group founded in 2008; aim to share PM strategies and tools and provide “cross pollination”. Note listserve - not that active but content heavy.

Interest from survey revealed to be heavily oriented towards Agile.
Lunch to follow - in Conference 2.

**Ann Caldwell, Brown University** - digital technologies dept - made up of 23 people in these units:
- Integrated Technology Unit
- Digital Scholarship Lab
- Digital Production Service
- Web services
- Repository Services

Lots of interaction within and outside of library. Before Agile - various non-strategic avenues of “planning”. Tried tools (JIRA, Trello) but tools were not well integrated.

“Scrum is an iterative and incremental agile software development framework for managing product development.”

Managers sent to a regional workshop. Decided we would go with three week scrums with fourth week being evaluation. Using google docs for scrum plan and scrum assessment. Define what’s included and what’s not. Board with stickies -- move stickies through the work
process.

Brings sense of accomplishment for staff, and a sense of predictable timeline for all stakeholders. However does not completely tame the demand/workload.

**Cynthia York, Johns Hopkins University** - Role of communication in Agile.
Approach that is timeboxed, delivers incremental versions of software.
Pilot - w/7 trainees of PM advocates Positioned in Digital Research and Curation Center. 4 years of Agile, people rotating on and off, distributed team members. Hard choices WRT resources and compromises. To keep communication clear, determined and analysis:
  - Inventory of communication tools (there were tons)
  - Evaluation - map tools to where they were used.
Proposed solution - (affected/tempered by available resources) scale down shared environment; migrate to free tools (Google).Desires to learn what others are doing.

**Delphine Khanna, Temple University** - How do we communicate ...
Open source software development (including coding, config, install, customization, etc.)
Capacity - clarity is important both internally and externally.
Traditional tools are good for some avenues of communication, but they do not give the birds-eye view, and do not express capacity.
This is problematic when trying to manage scope and manage customer expectations.
Solution? Use a Google spreadsheet to express capacity…
  - allow for easy re prioritization of tasks
  - Keep developers in the process
  - keep overhead low
Calendar-like view. Each programmer gets one line, and is scheduled into time slots. Keep scheduled slots clean (not other non-coding tasks). Predictions for time come from the second sheet - each project is listed, and each predicted in terms of needed time slots. Projects are listed as active if they are underway. This sheet functions as a priorities list. On the first sheet, each programmer also has a margin of flexibility scheduled in (misc. programming)
Developers feel that they have more control and clarity - they also assess the projects in terms of time. Sheet makes having appropriate conversations with all stakeholders easier.

**Meghan Musolff & Angelina Zaytsev, University of Michigan** - Project Management SIG: developing a culture of PM at UM. Peer led and focussed on skill sharing.
UM has several Special Projects Librarians that work within their units. Share a set of common responsibilities (documentation, policies/procedures assessment, communications lateral and vertical.) Usual PM temperaments, combined with tasks equals mad skillz.
Can lead to disconnection - as they often report to upper management leads directly.
So how to grow a culture of PM among colleagues (without a budget)?
PM SIG Manifesto 3 years ago. Programming
  - Events - discussion over lunch. On various topics.
• Speakers on topics related to PM
• Goal for each is to provide takeaways for participants.
• Some more whimsical events -
  ○ PM extravaganza half day event - tool duel.
  ○ PM your holidays
After 2 yrs - had reflective cycle - survey with 20 responses, all very positive. Other signs of interest as well (upper admin interest and wide participation in elist, interest from school of Information) Seems like a movement.
Advice for those who want to try it:
• ID a coalition of the enthusiastic
• Get top level support
• Learn from your peers
• Seek frequent feedback

Q - Given that emphasis is on success and delivery, what is the role of productive failure?
How to you learn from failure and use it to tune going forward?
• Brown - Failure is frequent - there are often bad reaction (within the team) regarding this, but the learning is more important. Does not see failure as a bad thing. Prepares on to respond to the unexpected.
• With enough support from upper management and others pilots can be informative.
• New ways forward (even simple ways with simple tools) are often results of past failures. Must be a reflection of the real state of a project, not the idealization of the work ahead. Reality based.
• SIG is a safe place to talk about failure. There are usually reasons for failure - lack of money, skills or alignment. Always do an assessment at the end of a project. This is just as important for successful results. We improve through reflection and applying what we learn.

Q - Tell us more about the tool duels -
• UMich - Looking for people who would enthusiastically promote their tools. “Against” each other. Keep it fun and lively. Not a lot of planning. Each presents for 7 min, and then did cross examine and rebuttal. Audience selected winner.

Q - How to successfully promote Agile within an institution and promote for it’s adoption.
• Brown - Only did it in one department. Dept head is AUL.

Q - What is the value placed on process and documentation vs. the value placed on development and delivery.
• Temple - Things are important because they are useful. This is true at all levels, work to create common understanding.
• Brown - teams working together alleviates the sense of surprise that can come along with requests.
• UMich - PM isn't a single skill, its a skillset. Try to change the conversation. The
value of good documentation proves itself when it is used in daily work. HathiTrust uses JIRA, which documents for wide team consumption. History of all given issues are clear.

Q - @ Delphine - lots of twitter on the spreadsheets. Interested in Organizational changes around these innovations. Aversion to time tracking?
- Template for sheet is ready to share
- not policing time. no 15 min increments. Fluid and voluntary process.
- Recommends that programmers develop sensitivity regarding how they spend their time - discovery.

Q - As people adopt Agile, they really prefer them over waterfall, but it does require a cultural shift. Curious - how have you convinced your management that this is a good idea to adopt?
- JHU - no convincing needed.
- Brown - AUL one that decided.
- Temple - Not really felt that this was a problem