PROJECT MANAGEMENT PRINCIPLES, METHODS, AND TOOLS
About Us

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BACKGROUND

In the Fall of 2016, the Georgia Tech Library launched its portfolio and project management program.
All projects start with an idea.
The Idea Funnel

Use Cases

As a (type of user) I want to (perform a task) So that I can (achieve a goal)
Use Case Examples

As a new student,

I want to know the best library resources,

so that I can complete my assignments.
Use Case Examples

As a **researcher**

I want to **identify top journals**

So that I can **know the best place to publish**
Use Case Examples

As a **reference librarian**

I want to **compile frequently used resources**

So that I can **efficiently answer reference questions**
Use Case Examples

As a **website administrator**

I want to **manage broken links**

So that I can **ensure our users have a positive experience**
Write your own use case

As a type of user:

I want to **perform a task:**

So that I can **achieve a goal:**
Activity 1: homework

In your own time:
What keeps this user from performing this task or achieving this goal at your library? How could you fix this?
BUSINESS CASE

The business case is the pitch you make to library leadership. It's the compelling vision for what you hope to accomplish as well as a chance for administrators to make an informed “yes” or “no” answer.

Key pieces

- Project
- Positive impact on client
- Viable alternatives
- Risks of not performing
- Negative impacts
- Facilitators of success
- Barriers of success

Seem like a lot of work?

It is less work than trying and getting nixed. And it is less soul crushing than never trying.
The Project

What do you want to do?

Directly tie the project to outcomes for your client.

- Preliminary data & case studies
  - Has anyone done this?
  - Does anyone do this well?
  - Case studies

- Viable alternatives
  - Workable
  - Affordable
Issues & Risks

What else might happen?

Administrators need full information to decide.
No need to exaggerate.

Negative impacts
- Expense
- Backfires
- People don't like it
- Negative publicity

Risks of non-performance
- No new partnership
- Things deteriorate
- Missed opportunity
What else drives success or failure?

**Dependencies**

Facilitators of success
- Strategic plan
- User input
- Cultural zeitgeist
- Collaboration across units

Barriers to success
- User disinterest
- Political interference
- Natural disaster
- Budget cuts
Sample business case

This purpose of this project is to evaluate the current LibGuides usage and metrics, clean up outdated and archived guides, craft a plan for the future of LibGuides, and develop a style guide and toolkit in support of best practices for guide creation and maintenance.

**Project Team:**

- Marlee Givens (PM)
- Liz Holdsworth (Core)
- Heather Jeffcoat (Core)
- Ameet Doshi (SME)
- Kimberly Griffis (SME)
- Alexis Linoski (SME)
- Jason Wright (SME)

**Timeline:** Completion date - May 31
HOW TO WRITE A PITCH

Pitch formula:

1. Problem, new idea, or object for optimization
2. Data
3. Tangible outcomes
4. Timeline, people, resources
5. Assessment strategy
Resources Needed

- Stakeholders
- Budget
- Team Members
- Timelines
## Charter

### PROJECT WORK = 6 months
- Planned start date: 01/04/2021
- Planned end date: 06/15/2021

### PROJECT TEAM = 7 members
- Core: Givens, Holdsworth, Jeffcoat
- SME: Doshi, Griffiths, Linoski, Wright

### PROJECTED COSTS = $0
- Planned capital = $0
- Planned operating = $0

### SCOPE
**In Scope:** LibGuides application, LibGuides integrations, Content publishing workflow, Facilitating discussion of content reviews, Out of date, broken, inaccurate content

**Out of Scope:** Database A-Z list, Database management, Topics for LibGuides, Authorship of LibGuides

### RISKS
**Risks of not Performing:** Misuse of resources, Poor quality user experience, Distributing outdated content

**Risks of Performing:** Reevaluation of Database A-Z software, Discover new tool for employee authorship, Shift of effort distribution if LibGuides under-utilized
Write your own business case

why? your project idea:

what? major deliverables:

how? budget and technology needs:

who? stakeholders and team members:
In your own time:
Complete the business case worksheet.
Project Lifecycle

KICKOFF
Charter is presented usually with a focus on the goals and timeline.

PLANNING
Project team develops a plan for execution and finalizes the budget and resource requirements.

PHASE REVIEW
Execution plan is reviewed, and any budget and funding requirements are discussed and approved by leadership.

EXECUTION
This is the phase where the tasks and deliverables are tackled.

CLOSURE
Project output is presented, Lessons Learned are shared, and any open items to complete the implementation of the project are documented.
Now that you have launched your project, how do you keep track of your work and get the feedback you need.
Accountability

Reporting throughout the project

Status reports
- Biweekly throughout project
- What was accomplished & what needs to be done
- In the moment requests

Phase review
- Before execution
- Request more resources
- Get critical course corrections
- Receive feedback
SUMMARY & CONCLUSION

IDEAS

- Anyone in the library can have an idea for a project
- Ideas should be supported by use cases

BUSINESS CASE & CHARTER

- A business case turns your idea into a project pitch
- The charter includes the business case, the outcomes, the impacts, drivers and barriers to success, and the necessary resources

COMMUNICATION

- Communication checkpoints keep your project on track and allow you to manage up
TEMPLATES

Idea, Charter, Status Report, Phase Review, Closure