New and Noteworthy: Project Management in Libraries

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Whether professional or personal, we all are tasked on a daily basis with planning and completing various short-term and long-term projects. "Project management," in a very basic sense, is the process of completing a series of related tasks to accomplish a goal. Another simple definition of project management, especially in an organizational setting, is "the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements."[1] Essential factors to consider in any project include scope, time, cost, human resources, and risk management, among others.

The process of effective and efficient project management in a business setting, however, requires a level of knowledge and discipline that is often not taught in graduate and professional programs schools. To address this need, project management as a professional discipline began to evolve into a professional field of study and certification in the mid-1950's. The non-profit Project Management Institute (PMI) was formed in 1969 to offer professional certifications, including the internationally recognized Project Management Professional (PMP) credential, which requires a number of hours leading and directing projects and 35 hours of recognized project management education.[2]

However, librarians and information professionals don't need to have a project manager certification in order to plan and manage successful library projects. Several recent books and articles focusing on project management in libraries provide a useful introduction to the field.

A good place to begin is with a new ALA Editions title, *Project Management in Libraries: On Time, On Budget, On Target*.[3] Librarian Carly Wiggins Searcy, herself a certified Project Management Professional, has distilled her professional experience and knowledge into a primer that helps professionals from novice to expert get started with project management in a library and information center context. This well-organized, thoughtful guide begins with an overview of project management and moves through relevant topics including meeting management, identifying and building relationships with stakeholders, planning for deliverables

and risk, budget planning, monitoring progress, and closing the project. Tips include how to run an effective meetings using checklists, how to choose the appropriate software to support your projects, how to write a project charter, how to manage "scope creep" (changes or uncontrolled growth in a project's scope) and how to make sure the project is actually closed (and stays closed) by using a checklist.

Based on the earlier title *Project Management: Tools and Techniques for Today's ILS Professional* (Facet Publishing, 2004), *The No-Nonsense Guide to Project Management* incorporates recent developments in project management, including advances in ICT (information and communications technology), social media, and crowdfunding and crowdsourcing.[4] Author Barbara Allan introduces the concept of project management, in particular its applicability to library and information services. Three common approaches to PM are discussed in Chapter Two: traditional, PRINCE2® and Agile. The book then takes the reader from the "getting started" phase through project planning, implementation, evaluation, and dissemination (reports, events, presentations, etc.). Later chapters cover key topics such as using ICT to support project work, the financial side of project planning, human resources considerations, and working in partnership on collaborative projects.

A particular strength of this book is its frequent inclusion of tables, figures, and relevant case studies. For example, Figure 1.1 offers a simple checklist that helps identify if an initiative is an actual project that can benefit from PM tools and techniques. Other figures include examples of action plans, weekly progress report forms, Gantt charts, and PERT diagrams. Brief case studies focus on all levels of library projects, and range from the common to the unusual. Not only are there examples of organizing a conference, managing a weeding project, moving a library, and merging services, but there are also case studies about dealing with flea infestations and "the introduction of a nine-foot tall Incredible Hulk statue in a public library." While much of the content is geared toward libraries in the UK, the book also include significant international content and examples as well.

The first volume in the 2018 Advances in Library Administration and Organization series, *Project Management in the Library Workplace* offers 17 essays from librarians in North American universities focusing on various facets of project management in library administration.[5] As editors Alice Daugherty and Samantha Hines note in the introduction, "Once

the realm of technology and business gurus, formal project management tools, techniques, and schemas have become more have become more commonplace in libraries. Using formal project management components can help libraries achieve their desired outcomes with less stress for employees" (xiii). Key topics include pre-project planning, workplace culture, collection services in archives and special collections, community engagement, building leadership skills, and use of project management techniques in digital projects.

Margot Note, Director of Archives and Information Management at World Monuments Fund, has brought her years of experience in the cultural heritage sector to *Project Management for Information Professionals*, a concise, useful overview of project management methods and best practices.[6] Project management is a vital area of concentration for librarians, Note writes, especially in a climate of challenging funding and diminished resources: "In a business environment that requires doing more with less, information professionals who master project management demonstrate their worth by getting things done under these exigent conditions. This is where project management comes into play" (xii). After a thorough and useful literature review, Note launches into an overview of project management project selection and definition; working with people; planning and scheduling; budgeting and performance evaluation; communication and evaluation; and project completion and review. Appendices include suggested readings, online resources, software programs, a glossary of terms, and standard project management templates. While the book could be improved by the inclusion of real-world examples and illustrations, tables and figures illustrating key concepts aid in understanding the material.

A recent article in this journal (*Library Leadership & Management*) offers a case study of project management at the University of New Hampshire Library. UNH Information Technology Librarian Val Harper discusses how "rightsizing" selected project management techniques and tools in her library resulted in a successful collection integration and relocation project.[7] Projects from a variety of sources within the organization led to problems including unplanned changes to job descriptions, insufficient funding, and lack of communication regarding competing projects. An organized strategy was needed for a planned major collection move, including a cross-departmental project team, a well-defined project scope and deliverables, and clearly delineated

task list. Harper's description of the project offers suggestions and tips for other libraries seeking to plan other initiatives with limited project planning experience on staff.

As mentioned earlier, many librarians faced with project management responsibilities have had no or very limited training in formal PM techniques and practices, either in their LIS program or post-graduation. Researchers Silvia Cobo Serrano and Rosario Arquero Aviles recently conducted a study to identify academic librarians' education and training in PM, to analyze their perception of relevant skills and participation in project, and to uncover their perception on related courses in the LIS curriculum.[8] Of the nearly 650 librarians who responded to the online 17-question survey, most of whom were from North America, South America, and Europe, approximately 40% considered PM courses to be of high importance in the university curriculum, and 26% thought that PM courses were extremely important in their professional work. Thus, the study concludes that project management skills are a necessary component of LIS curricula and play a vital role in accomplishing the strategic goals of library organizations.

Given the strong relationship between project management and technology, online resources focused on general information, tips, techniques are easily found through a simple web search. A particularly useful online resource geared toward project managers working in digital libraries is the Digital Library Foundation (DLF) Project Managers Toolkit.[9] This collaborative resource has been maintained by members of the DLF Project Managers Group since February 2013, and includes links to project management basics, a list of software, and a Zotero Group library for further reading. Another site with valuable information is maintained by Duke University Libraries' Angela Zoss, who has created an interesting research guide on Project Management including section on getting started, planning and prioritizing, and monotasking.[10] A particularly unique feature of the guide is its links to printable project management zines. While geared primarily toward students, it can serve as an easy and fun introduction to basic project management for library professionals as well.

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[2] The Professional Management Institute website (https://www.pmi.org) offers information about PMI
certifications, membership options, publications and tools, local chapters, sample PM templates,
and more. A similar organization is the International Project Management Association
(https://www.ipma.world).

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