

Always Create a Plan: Everyday Project Management for Librarians and Teams of One

Robin Naughton

Abstract

Librarians and library leadership can benefit from the use of project management tools and processes to manage everyday projects so that it is easier to identify and complete projects. If it is clear that a task is actually a project, then library leadership can allocate the appropriate time and resources required to successfully complete it. The focus of this article is the use of project management to help librarians, particularly librarians who are teams of one, with everyday project management. It describes and outlines the Always Create a Plan (ACP) project management method and how it can be used for a project.

Introduction

On an average day, academic librarians may teach an instruction session to students, answer a series of reference questions in person and online, provide resources and support, collaborate with a colleague on a research project, organize an event, give a tour of the library, work on a blog post to showcase library resources, attend committee meetings, submit a conference presentation, work on a website design, update a server, and many more activities. They work hard to respond to the needs of students and faculty, to be collaborative and helpful to colleagues, and to provide valuable information while figuring out how to optimize their time, productivity, and resources. With limited resources, librarians have learned how to use available tools to solve problems as they arise. Project management is one tool that is underutilized in the librarian toolkit, even though, as Schachter (2004) puts it, “Librarians are ideally suited for project management due to our expertise in the areas of planning, supervision, information analysis, and other general skills” (12).

Definitions of project management vary, but the Project Management Institute’s definition is one standard that is used throughout the literature, which defines project management as “the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements” (Project Management Institute 2013, 5). Project management is about getting things done, based on the project’s requirements, with the resources, time, and budget available while providing value. A project is defined as “a temporary endeavor undertaken to create a

unique product, service, or result” (Project Management Institute 2013), which includes a goal, a beginning, and an end. The project manager (project lead) is the person responsible for managing the project from beginning to end, whether that person has the title of project manager or not. Project management techniques help “library managers to structure tasks and find the right people to complete them, while measuring the success of the projects” (Winston and Hoffman 2005). Project management may appear complex and designed for large projects, which may be a reason that librarians do not engage with project management tools and processes for everyday projects. Although librarians and library staff do not think of themselves as project managers, they manage multiple projects, performing the tasks necessary to make the project successful, even if they do not call what they do a project or themselves a project manager. Academic libraries, situated in the broader university context, are full of projects, but there is no consistent use of project management tools to manage the projects (Prosser 2024). Academic librarians and library staff manage projects and may find themselves as a team of one, responsible for a unit and all associated work of that unit without any additional resources. This article describes Always Create a Plan (ACP), an approach to using project management tools and processes to help academic librarians manage everyday projects.

Literature Review

Project management in libraries has been used to manage a variety of projects, including but not limited to projects dealing with websites and technology (Fagan and Keach 2011; Schachter 2004; Stanley, Norton, and Dickson 2003), physical moves/collection relocation and integration (Harper 2018), digitization and virtual reference services (Serrano and Avilés 2016), and research data services programs (Bjornen and Ippoliti 2021). According to Feeney and Sult (2011), “Managing projects is not a new topic for libraries; however, because of the changing nature of library work, along with resource constraints and expectations for accountability, the need for effective project management has increased” (745). Although libraries have many projects, the practice of project management processes in libraries is still developing, and a recent scoping review highlights the slow adoption of project management in academic libraries. Prosser (2024) conducted a scoping review of project management in academic libraries to understand the current literature and what can be learned from using project management tools and processes (Prosser 2024). The study reviewed 46 articles about project management in academic libraries and identified the frameworks, software/tools, and types of projects. Prosser (2024) concluded that “there is no consistent system of formal project management within

academic libraries.” Academic libraries select and use project management processes and tools based on their context and library needs.

Özdamli, Sultan, and Karanfiller (2023) conducted a systematic review of the software tools libraries used for project management and concluded that libraries and librarians benefit from using project management software (e.g., Agile methods, Notion Dashboard, Asana, Kanban, and Trello) but encounter challenges with limited resources, particularly around keeping up with software, budgeting, and training in project management. Similar to Prosser (2024) and a theme seen throughout the literature, libraries use project management tools as needed.

One challenge highlighted in the literature was the lack of training and professional development of project management skills within libraries (Özdamli, Sultan, and Karanfiller 2023; Prosser 2024; Winston and Hoffman 2005). The daily work of a librarian can fall into multiple categories, but as Val Harper puts it, “Most work in libraries falls into two major categories: operational activities and projects. Operational activities are those performed routinely, the normal procedures and workflows by which we perform essential library services.

Projects, by contrast, have discrete beginnings and endpoints, involve a unique set of tasks and resources, produce a specific deliverable, and, once completed, will not be repeated” (Harper 2018, 1). Management is an additional category that requires librarians to have management skills to manage operational activities and projects.

Educational training in traditional library management helps to streamline operational activities, but there is not enough educational training in project management to help streamline projects. Winston and Hoffman (2005) provided an overview of the state of project management in libraries and addressed the issue of preparation and training in project management for libraries. They concluded that the field needed more project management training in educational programs and professional development, as project management skills are becoming necessary in the management of libraries. Even if libraries do not use all the project management processes, Winston and Hoffman suggested that processes such as “planning and initiation phases” can be helpful in providing an efficient work environment. Recent literature continues to echo the need for project management training for librarians in educational programs (Özdamli, Sultan, and Karanfiller 2023; Prosser 2024).

Building on the work of Serrano and Avilés (2016), Guimaraes et al. (2021) provided an overview of the state of project management in libraries and made recommendations on how ALA Core can begin to address the need. According to Guimaraes et al. (2021), the result of their study indicated that there are gaps in practice and skills within libraries, and professional development can help to increase the knowledge and experience of project management in

libraries. In addition, their research highlighted the need for administrative and management leadership in developing and providing project management training and support in libraries (Guimaraes et al. 2021). Due to the lack of training and professional development in project management, libraries are missing essential processes, tools, and techniques to help streamline library projects. According to Prosser (2024), “better education and training of academic librarians in project management principles” (10) can help address the challenges libraries experience with project management.

Throughout the literature, there has been an emphasis on selecting the appropriate tools and techniques that would work in a library setting. Even though there has been a push toward more project management in libraries and making use of standards such as Project Management Body of Knowledge (PMBOK®) Guide (Project Management Institute 2013) or Projects in Controlled Environments (PRINCE2; Stanley, Norton, and Dickson 2003) or Agile with Scrum (Cervone 2011), authors have rightly pointed out that libraries can select, use, and “adapt those principles to the library’s own requirements and resources” (Harper 2018, 2) and use what works with the library’s environment and context (Prosser 2024).

“Rightsize” is a term used by Harper (2018) to describe identifying and selecting the appropriate project management principles (scope, timeline and tasks, and resources) that can be easily applied and implemented for the University of New Hampshire Library’s web and other library projects, including a major collection integration and relocation project. Harper suggests adjusting the project management tools and processes according to the needs of the library project rather than adjusting the library project to the needs of the project management processes. “Rightsizing projects can mean finding the balance between strictness and flexibility in planning,” stated Harper (2018, 9). By highlighting the importance of having flexibility in planning, Harper (2018) let libraries know that they do not have to be all or nothing when using project management standards and processes. Rightsizing addressed the challenge of having to learn an entire new domain to manage a library project that may not need all the processes of the project management standard. It means that understanding the library context, resources, work habits, and project needs will help to determine how strict or flexible the planning needs to be for a given project.

Rightsizing provided an approach to using project management processes, tools, and techniques for library projects; going beyond rightsizing is using project management methodology for project teams of one. In *Everyday Project Management*, Davidson (2019) emphasized, “Unless you’re able to successfully manage yourself, how can you manage others, let alone the intricacies of a project?” (22), suggesting that the ability to self-manage is as

important as managing a project or a project team. With the constraints and limited resources available in academic libraries, librarians often find themselves managing multiple projects as a project team of one. Although there may be multiple librarians within a given library, a librarian may be the only one managing a particular aspect of the library, which makes the librarian a team of one, responsible for both the operational activities and the projects within that area. If librarians are trained to manage operational activities and not projects, then the projects suffer from a lack of management. Project management, when applied to a team of one, can help librarians manage multiple library projects as individuals and as part of their daily work. Library leadership and administrators can support librarians by providing professional development that trains librarians in project management skills.

The Always Create a Plan Approach

The ACP approach draws from multiple project management methods to highlight the core aspects of project management and provides a matrix to guide the use of ACP. The challenge of using project management is that each methodology or standard has its own terminology to describe its principles and processes, which must be learned before implementation. Regardless of the terminology, the core of project management remains the same, and the goal is to understand the concept that the terminology represents. Davidson (2019) advises to “stay focused on the underlying concepts that key terms encompass” to understand the goals of the terminology used. Most projects, when viewed holistically, have phases of starting (initiating a project), doing (working on the project), and ending (completing the project). Project management methodologies (PMBok, PRINCE2, Agile Scrum, etc.) augment the basic phases to account for additional aspects of successfully moving a project throughout the full lifecycle (Table 1). In addition, Harper (2018) and Schachter (2004) selected different aspects from a standard methodology to use for their project management (Table 1), emphasizing the need to use what is necessary for the library project rather than everything available. This method of using “project management principles and tools to fit each unique situation and environment” is a consistent trend in academic libraries, even if there is no consistency in the tools selected (Prosser 2024).

Table 1. Project management lifecycle

Project Management Body of Knowledge (PMBok)	Projects in Controlled Environments (PRINCE2)	Agile Scrum (Cervone 2011)	Harper (Harper 2018)	Schachter (Schachter 2004)
<ul style="list-style-type: none"> • Initiating • Planning • Executing • Monitoring and controlling • Closing 	<ul style="list-style-type: none"> • Starting • Directing • Initiating • Controlling • Managing product delivery • Managing the stage boundaries • Closing 	<ul style="list-style-type: none"> • Kickoff • Sprint planning • Sprint • Daily scrum • Sprint review 	<ul style="list-style-type: none"> • Scope and tasks • Resources 	<ul style="list-style-type: none"> • Start • Scope • Planning • Monitor and control • Completion

Drawing from the standard methodologies, the ACP approach augments the basic three phases with additional phases—“Plan and Track” and “Communicate”—for a total of five phases. The author created it as a variation of the project management standards with an eye toward simple action. The five phases are as follows:

- **Start:** initiate (kickoff) the project.
- **Plan and Track:** create a project plan that outlines the needs of the project and a way to track all aspects of the project throughout the lifecycle.
- **Implement:** do the work and execute the plan for getting the project done.
- **Communicate:** communicate project status and work with project teams and stakeholders regularly and effectively.
- **Launch:** complete and close the project.

Librarians use variations of standard project management processes based on the library environment, project needs, and a librarian’s experience with project management. Because there is no consistent project management method used in libraries, there is a need for a

method that is easy to use, learn, and implement to get everyday projects done. The ACP approach provides librarians with a tool that can easily apply project management techniques to library projects regardless of size and whether the project team is a team of one or more members. For each phase of the project, asking and answering questions will help to clarify the project needs, and the ACP matrix (Table 2) is a quickstart guide to thinking about project phases.

Table 2. Always Create a Plan (ACP) matrix questions

<p>START</p> <p>Initiate (kickoff) project</p>	<p>Goals (Scope)</p> <p>What are the goals/objectives of the project?</p>	<p>Success Metric</p> <p>What criteria determine that the goals/objectives of the project are complete?</p>	<p>Audience</p> <p>Who is the project for?</p>	<p>Budget and Justification</p> <p>Why is this project needed? What is the available budget?</p>
<p>PLAN and TRACK</p> <p>Create project plan and keep track daily</p>	<p>Timeline</p> <p>When will the overall project begin and end? What are the individual milestones?</p>	<p>Requirements (Specifications)</p> <p>What are the details of the project and steps to accomplish them?</p>	<p>Resources and Tracking</p> <p>What are the available resources (people, time, budget, etc.)? How to track all the requirements, tasks, budget, and resources?</p>	<p>Tasks, Risks, and Constraints</p> <p>What are the tasks and subtasks? What are the risks? What are the constraints and dependencies?</p>
<p>IMPLEMENT</p> <p>Execute Plan</p>	<p>Work</p> <p>What tools will help to get the work done effectively?</p>	<p>Scope Creep</p> <p>What has suddenly come up that is outside</p>	<p>Flexibility</p> <p>What has changed and needs to be adjusted?</p>	<p>Iterate</p> <p>What new information should be</p>

		the scope of the project?		integrated into the project?
COMMUNICATE Communicate regularly and effectively	Communication Method How to communicate with the project team, stakeholders, leadership, external partners, and so on?	Communication Frequency What is the frequency of communication with the project team, stakeholders, leadership, external partners, and so on?	Interpersonal What are the working styles of the project team?	Documentation What documentation is available?
LAUNCH Complete project	Complete What does launch (completion) mean?	Share Who should be notified that the project is complete?	Project Post-mortem What was successful (worked) and unsuccessful (did not work) throughout the project? How can it help with future projects?	Handoff Who should handle the product, service, or result after launch? Should there be a transition to a new owner for continued maintenance?

The questions in each phase of the ACP matrix help to determine how the project moves forward. The “Start” phase questions are asked at the beginning of the project to determine the overall scope and available resources to do the project. Answering these questions helps to situate the project, create a one-pager, and prepare a project plan. The project plan is developed based on the “Plan and Track” phase questions, which address the specifics of the

project and all requirements and tasks needed to implement the project. The project plan guides the implementation of the project, and the “Implement” phase questions help to address new information and changes to the plan during implementation so that there is a consistent method for integrating changes throughout the project.

The “Communicate” phase questions can be asked at the start and throughout the project to ensure regular and effective communication. “Communication Method” and “Communication Frequency” help when creating a communication plan for the duration of the project. The question on interpersonal communication helps with understanding the working styles of the project team and how to communicate effectively based on working styles. A critical component of project management that is sometimes overlooked is the importance of interpersonal skills to the success of projects (Castro et al. 2022; Davidson 2019; Özdamli, Sultan, and Karanfiller 2023; Rodrigues and Matos 2024). As Davidson (2019) puts it, “Make no mistake: Interpersonal skills are as critical to the project manager as technological skills” (42). Communicating effectively with both internal and external members of the project will determine the level of success of the project. Castro et al. (2022) and Rodrigues and Matos (2024) researched the role of emotional intelligence in project management and concluded that emotional intelligence improves communication and is critical for project success.

The “Launch” phase questions can be asked as the project progresses to determine what it means to complete the project and the next steps after launch. The “Project Post-mortem” is a method that takes the lessons learned from the current project, what did and did not work for the project, and uses that knowledge for future projects, enhancing future project management. The “Launch” phase questions also address the future of the product, service, or result created after launch.

For each phase of the ACP matrix, the questions guide and move the project forward.

Applying ACP to a Library Project

The ACP matrix provides librarians with a guide to use project management processes with everyday projects from the simple to the complex. Academic librarians receive many requests, and they need to determine whether a request is a task, a project, or an operational activity. Library administration and leadership can help librarians to identify projects versus operational activities by understanding the definition of a project and determining ahead of time that a request is a project, which will significantly help librarians to plan, allocate time, and receive appropriate resources. Project management begins with the premise that a request is a project,

and the goal of project management is to plan and execute on an already determined project. However, who determines that a request is a project is unclear. A librarian receives a request as a task, but on closer examination that task is a project with multiple subtasks. The librarian has spent time figuring out the request, but now the librarian must advocate for the project needs if the leadership thought that the project was just a task or operational activity to complete. Thus, library leadership can and should help to determine if something is a project so that librarians spend less time advocating to change a request from a task or operational activity to a project. An operational activity is different from a project, and the assumptions made about time, resources, budget allocation, and so on, can vary dramatically based on library leadership's approach to an operational task versus a project.

Projects grouped as operational activities lose the specificity of tracking the project lifecycle. For example, doing reference work, whether online or in person, is an operational activity that is a continuous service. Assigning a librarian to do reference means adding a continuous task to the librarian's work, but assigning a librarian to set up a chatbot to do reference is a project, "a temporary endeavor undertaken to create a unique product, service, or result" (Project Management Institute 2013) with a goal, start date, and end date. After launch, the chatbot is integrated with the reference service, and the maintenance of the reference chatbot becomes an operational activity, a continuous task of the reference team. If the chatbot assignment is not considered a project but a routine operational activity, appropriate time and resources are not allocated to it. Identifying projects versus operational activities will help both librarians and library leadership as they allocate resources and plan budgets.

Website Migration Project

The following case study describes the use of the ACP approach to apply a project management process to the migration of the Queens Memory Project (QMP) website to the Queens College Library (QCL) servers.

Queens College, City University of New York (CUNY) is an urban public university with an enrollment of almost 20,000 students and an academic library, QCL, that houses more than 800,000 volumes. At the time of the project, there were approximately 16 full-time academic librarians, at least four of whom were teams of one overseeing different units of the library, and a library staff that included both full-time, part-time, and student workers.

Queens Public Library is a public library with 66 locations serving more than 700,000 card holders. The QMP, a Queens Public Library program, was already part of a successful collaboration with QCL, which led to a website migration project.

START: Initiate (Kickoff) project

In September 2020, QCL agreed to host the QMP website on its servers because the current host of the website would no longer host it on their servers. The strong collaborative partnership between QCL and QMP made it possible for QCL to take on the hosting of the QMP website. The author, then the new web and digital services librarian (WDSL), attended an initial meeting with the stakeholders, including QCL library leadership, the QMP project director, and the current host of the website, to discuss expectations and goals of the migration project. The goal was to host the website on QCL servers and make it possible for QMP to retain control of the URL. Because the library managed its own servers, it was the responsibility of the WDSL to move an active and interactive website from one server to another, which required more work than simply moving files. It meant that multiple systems had to integrate, talk, and respond to each other.

From the initial meeting, it became clear that library leadership thought of changing the host as a simple and quick operational activity with a series of tasks to complete. The thought seemed to be that the current host would provide the website data files, the new host would put them on the server, and it would all work with little additional effort. On close examination, the WDSL determined that it was a server migration project with no redesign or functionality changes, but a project (a temporary endeavor with a beginning, middle, and end), nonetheless. This meant that the WDSL needed to plan for a website migration project rather than receiving a simple task to add to the WDSL workload. Technology migration projects, even if there is no change, require planning and a process to account for all aspects of the project. Identifying the website migration as a project and getting buy-in from the library leadership meant that time and resources could be allocated to the project, especially since the WDSL was a team of one librarian with no additional staff. As a team of one, the WDSL managed both operational activities and projects from start to finish, so allocating time was critical to getting the project completed.

The “Start” questions captured the context and goals of the project from the initial meeting and helped with creating a one-pager about the project (Table 3).

Table 3. START questions

START: Initiate (Kickoff) Project	
Goals (Scope) What are the goals/objectives of the project?	To host the website on the library servers and to allow the team to continue to manage their domain (URL).
Success Metric What criteria determine that the goals/objectives of the project are complete?	The library servers host the website, users can use the website seamlessly without any loss of information, and the QMP team still manages the domain (URL).
Audience Who is the project for?	The audience for the project is the QMP team. End users should not be affected by this change.
Budget and Justification Why is this project needed? What is the available budget?	The current host could no longer host the site, and as a partner to QMP, the library agreed to provide server space to host and support the website. No budget was allocated for the project. The QCL hosted the library servers and did not require an additional cost to add the website.

The answers to the questions were brief but specific enough to clarify the context of the project, the goals/objectives, and expectations. Knowing when a project is complete is also a challenge of project management, and the success metric clarifies the expectation and definition of “done” at the onset of the project. One of the challenges of library work is that projects functioning as operational activities have no completion criteria and linger uncompleted. The success metric helps to determine project completion.

PLAN and TRACK: Create Project Plan and Keep Track Daily

The “Plan and Track” questions (Table 4) helped with creating specifications and a project plan. Project plans can be as simple or complex as necessary, keeping track of the milestones, tasks,

task constraints, task status, budget, and resource allocation. The level of detail of the project plan can be adjusted based on the needs of the team and the context of the project. For this project, the plan was a simple document that included the timeline, a brief specification with the requirements as identified by the questions and associated constraints.

Table 4. PLAN and TRACK questions

PLAN and TRACK: Create Project Plan and Keep Track Daily	
<p>Timeline</p> <p>When will the overall project begin and end? What are the individual milestones?</p>	<p>The project started (kicked off) in fall 2020 with a plan to implement the change in 2021, providing a flexible timeline to do the installations and testing before adding the site to the library’s live server. The main goal was to finish the project by the end of 2021 with work happening in spring and summer 2021, completing the site, updating the URL, and launching in fall 2021.</p>
<p>Requirements (Specifications)</p> <p>What are the details of the project and steps to accomplish them?</p>	<p>The requirements covered server access, WordPress installation of individual instance, export and import of website data from current website host, build testing instance, quality control testing, and rebuild on live site, update of domain to point to library servers, and launch of website.</p>
<p>Resources and Tracking</p> <p>What are the available resources (people, time, budget, etc.)? How to track all the requirements, tasks, budget, and resources?</p>	<p>No additional resources in terms of people or budget. However, the timeline was flexible, even with the expectation that the website needed to migrate sooner rather than later.</p>

<p>Tasks, Risks, and Constraints</p> <p>What are the tasks and subtasks?</p> <p>What are the risks?</p> <p>What are the constraints and dependencies?</p>	<p>Major tasks and constraints identified included the following: make sure the domain is consistent, no change to user experience, little to no downtime, and keep the same content and functionality.</p>
--	---

As a team of one, the questions on the requirements guided the documentation so that it focused on the most important aspect of the project. A simple project plan highlighted the timeline, major milestones, and tasks of the project for the stakeholders and library leadership. When a single resource does all the work, simplify the project plan to focus on the major requirements of the project without all the subtasks of implementation for that resource. The WDSL knew her own work style, the expectations of the library leadership and stakeholders, and the context of the project, which helped to create a project plan with higher-level tasks and fewer specific subtasks while allocating additional time to implementation. A larger team (two or more) would require detailed subtasks to account for the distribution of the work and resources.

With a plan created, the WDSL tracked the project consistently and regularly throughout its implementation. Each day working on the project required working with the specifications and the plan to address the requirements and meet the milestones based on the timeline.

IMPLEMENT: Execute Plan

The project plan provided a guide for implementation and achieving all the major milestones. The “Implement” questions (Table 5) asked throughout the implementation phase address how the work will get done and any issues that may arise as the project work is being executed based on the project plan. Project management considers surprises throughout the project and builds in flexibility to deal with those surprises. The questions for “Flexibility” and “Iterate” emphasize the need to have a method for integrating new information into the implementation process and adjusting the plan if the execution is affected.

Table 5. IMPLEMENT questions

IMPLEMENT: Execute Plan	
Work What tools will help to get the work done effectively?	For this project, basic tools include MS Word, Excel, and a task list.
Scope Creep What has suddenly come up that is outside the scope of the project?	IT requested server maintenance, updates and adding a port prior to IT making the DNS change.
Flexibility What has changed and needs to be adjusted?	Allocated additional time and resources for the WDSL to work on the IT project and do the additional tasks requested by IT prior to the DNS change.
Iterate What new information should be integrated into the project?	The information integrated was a new method for testing the DNS based on the new port.

Highlighted in the answers to the questions was the challenge of working with the information technology (IT) department to update the domain name system (DNS) for the domain so that it pointed to the library servers while QMP retains management over it. DNS changes were the purview of the IT department, and they were responsible for making any changes that affected the URL. Once the site was ready (migrated, installed, tested, and verified), IT was notified that the site was ready for the DNS change. On the project plan, it was a task with enough time allocated, and the request, submitted in October 2021 with a goal of launching the site in December 2021, provided IT with enough time to make the DNS change and launch the site. However, that is not what happened. IT determined that a server update was necessary prior to the DNS change. A task on the project plan turned into a mini project that included server maintenance, server updates, and a new port before updating the DNS. It was possible to do the DNS change first, closing out the migration project, and then doing server maintenance, but the DNS change came after the server maintenance, and the project

timeline changed from December 2021 to January 2022. Understanding dependencies is critical to understanding constraints and challenges that may arise throughout the project. The DNS change was a dependency that affected the next phase of the project.

The IT request was an example of scope creep, an expansion of the scope beyond what was determined by the specification of the project. Scope creep can be as simple as changing/expanding the goals of the project or adding tasks or as complex as a sub-project to the current project. Scope creep can happen throughout the project, and the project manager determines how to address the changes to the specifications and goals of the project. In this case, the only way forward to complete the project was to make the requested changes prior to the DNS change and adjust the project timeline.

COMMUNICATE: Communicate Regularly and Effectively

Often overlooked or not done effectively, communication is one of the most important aspects of getting work done. Underestimating the value of communicating effectively can have a negative impact on a project. Project management is about helping people to solve problems, which means that developing strong interpersonal skills and communicating effectively is a key to success. The “Communicate” questions (Table 6), asked at the beginning and throughout the project, provide the answers to create a communication plan for the project. Based on an understanding of the project team and stakeholders, weekly meetings were not necessary, but status updates (milestones and progress reports) via email and a meeting every two months worked better. In addition, during the testing phase of the project, the frequency of communication increased to accommodate the needs of daily updates and weekly progress to complete the work.

Table 6. COMMUNICATE questions

COMMUNICATE: Communicate Regularly and Effectively	
Communication Method How to communicate with the project team, stakeholders, leadership, external partners, and so on?	The primary method of communication was email and status meetings with the stakeholders throughout the project.

<p>Communication Frequency</p> <p>What is the frequency of communication with the project team, stakeholders, leadership, external partners, and so on?</p>	<p>Regular communication was at least once per month or more as needed. Communication frequency increased during the testing and feedback phases of the project, because those phases of the project required constant work to complete the tasks.</p>
<p>Interpersonal</p> <p>What are the working styles of the project team?</p>	<p>The project team consisted of the WDSL. Two members of the IT server team worked on the IT project with the WDSL. Understanding the work style of the IT server team helped to get the work done.</p>
<p>Documentation</p> <p>What documentation is available?</p>	<p>The main project documentation included the requirement document (specification) and an IT project form documenting the DNS change.</p>

Larger teams of two or more may have regular and frequent communication among the project team members regarding the daily goals and tasks, but that type of communication was unnecessary for a team of one. Besides communicating with the project team and stakeholders, project managers also learn the communication styles of other departments to communicate effectively about the project. Academic librarians, particularly web and digital librarians, work with IT departments regularly because the work requires interfacing with technical information systems on a continuous basis. One challenge in libraries is developing effective communication and collaboration with IT departments. For this project, two members of the IT server team worked on the DNS change, and learning the IT server team’s communication style and expectations of getting work done was necessary to communicate effectively rather than try to use a different method of communication. The goal of the IT project was to get the work done (i.e., make the DNS change). Using a process that was already in place and worked for the two members of the IT server team built on the interpersonal skills necessary for effective communication and getting the work completed.

LAUNCH: Complete the Project

The project was completed and launched successfully, even though the project timeline was adjusted by one month. Building flexibility into the project plan created the space to integrate new information into the project. New information can create a cascade of changes that have a

direct impact on the project, but understanding the urgency and priority of the changes help to integrate the new information. The “Launch” questions (Table 7), asked at the end of the project, determine what it means to complete the project, notify stakeholders, and reflect on the work. The answer to the “Complete” question builds on the earlier question on “Success Metric” by confirming that the metric has been met so that the project can be closed. In academic libraries, projects can remain open because of a lack of completion criteria that provide the metric for what it means to close a project.

Table 7. LAUNCH questions

LAUNCH: Complete Project	
Complete What does launch (completion) mean?	Launch means that the website transitioned to the library servers, is working as expected, and users can access the website seamlessly.
Share Who should be notified that the project is complete?	Once the project was completed, the stakeholders (library leadership and the QMP team) were notified. Additional notification and/or announcements were up to the QMP team, as they are responsible for the website.
Project Post-mortem What was successful (worked) and unsuccessful (did not work) throughout the project? How can it help with future projects?	Planning to have the work completed before working with the IT department was a successful approach because it provided flexibility and room to deal with the additional needs that developed once IT was involved. The timeline did not work, even though enough time was allocated for most tasks. For future projects, allocating much more time to work with IT would be necessary. Although the actual tasks may not take long, getting IT resources to do it can take longer than planned.
Handoff Who should be responsible for the product, service or result after launch? Should there be a transition to a new owner	Upon completion, the project transitioned to the QMP team for daily maintenance and management, but server hosting support remained with the Web and Digital Services team.

for continued maintenance?	
----------------------------	--

Launch is an opportunity to learn from what happened during the project and apply that learning to future projects. For a team of one, documenting what happened and following up with the project’s stakeholders is one way to reflect on the project and how to enhance future projects. In this project, the author learned a lot about working styles and how work gets done, particularly for the IT team as it relates to the library, and can use that knowledge going forward when working with different teams.

Recommendation

From the simple pen and paper to more complex Microsoft Project software, project management tools and software are widely available for any project (Özdamli, Sultan, and Karanfiller 2023). Select a tool to use based on an understanding of the context of the project, how the team and stakeholders will use the tool, and specific project needs. For this project, the tools were kept simple (see Table 5) because it was a team of one, and the project stakeholders only needed status reports rather than daily interaction with the project tasks. Project management is not about the tool, as the tool may change depending on the project, but it is about asking the right questions and communicating effectively. The following recommendations can be used for any project, regardless of context or size.

Write a One-Pager: Write a one-page document with all the key details of the project (title, summary, contact, timeline, milestones, etc.), developed based on the “Start” questions (see Table 3). The goal is to create a succinct document (charter) that is a great executive summary for anyone, especially leadership, to learn about the project quickly. Most people outside the project team do not have time to read and understand detailed and complex project plans. This is also a reference throughout the project to quickly confirm that the project is on track and meets the defined goals.

Develop a Project Plan/Tracker: Develop a document, project management software, or simple spreadsheet that outlines and tracks all the steps, timelines, milestones, and resources needed to implement and complete the project. The goal is to have a plan for completing the project, whether that project is simple or complex, and a tool for tracking

all the details and statuses throughout the project. Use the “Plan and Track” questions (See Table 4) as a guide.

Create a Communication Plan: Create a document that outlines the plan for regular communication (meetings, text, email, software, wiki, phone, conference call, etc.) throughout the project with the stakeholders, team members, and others. Understanding how people communicate and the best way to share information will help to make the project successful. The goal is to effectively share information about the project in the best way possible and at a regular frequency. Use the “Communicate” questions (see Table 6) as a guide.

Regardless of the context and size of the project, creating these documents will be a baseline that can guide the project from initiation to completion. For simple projects or teams of one, these documents may be all that is needed to manage the full lifecycle of the project. Although each project will have its own additional documentation, these three pieces of documentation will make it easier to understand and execute the goals of the project, communicate effectively with project stakeholders and leadership, and help the project be successful. Knowing and documenting the clarity of the goals and what it means to be done will help the project be successful.

Conclusion

Project management processes and tools can help librarians with everyday projects, particularly if the librarian is a team of one. Some requests may appear as simple tasks, but checking the task against the definition of a project will help to determine if the request is indeed a simple task, a project, or an operational activity. Library leadership and librarians can work together to determine if a request is a project because project management is based on the premise that the request is a project. If the request is not a project, then the request will be managed in a different way, but if it is a project, then project management processes can be applied and appropriate resources allocated. Librarians are exploring different ways to use project management processes and selecting the process and tools that work for the particular context (Prosser 2024). The ACP approach to project management provides a method that is simple and easy to execute so that the focus is on getting the work done. The ACP matrix (Table 2) is a guide to asking questions throughout the project to make sure that the work is moving toward the project goals. Academic librarians can use ACP to organize the goals and requirements of

library projects and work on and complete everyday projects, whether those projects are simple or complex.

Future Research

This case study describes the ACP approach to project management that is focused on helping academic librarians ask and answer questions about the project goals throughout the project lifecycle. The growth of generative artificial intelligence (AI) in the years since the project's completion fuels a need to address the role of AI in project management in academic libraries as a future research direction. Project management in academic libraries continues to evolve, and future research can build on the ACP and ways to streamline project management so that it works more efficiently for academic librarians.

References

- Bjornen, Kay K., and Cinthya Ippoliti. 2021. "Making It Better: A Project Management Framework for Creating a Research Data Services Program." *Issues in Science and Technology Librarianship*, no. 99. <https://doi.org/10.29173/istl2623>.
- Castro, Marcela, André Barcaui, Bouchaib Bahli, and Ronnie Figueiredo. 2022. "Do the Project Manager's Soft Skills Matter? Impacts of the Project Manager's Emotional Intelligence, Trustworthiness, and Job Satisfaction on Project Success." *Administrative Sciences* 12, no. 4: 141. <https://doi.org/10.3390/admsci12040141>.
- Cervone, Frank H. 2011. "Understanding Agile Project Management Methods Using Scrum." *OCLC Systems and Services: International Digital Library Perspectives* 27, no. 1: 18–22. <https://doi.org/10.1108/106507511111106528>.
- Davidson, Jeff. 2019. *Everyday Project Management*. Oakland, CA: Berrett-Koehler Publishers. <http://ebookcentral.proquest.com/lib/qc-ebooks/detail.action?docID=5802155>.
- Fagan, Jody Condit, and Jennifer A. Keach. 2011. "Managing Web Projects in Academic Libraries." *Library Leadership & Management* 30, no. 3: 1–6. <https://doi.org/10.5860/llm.v25i3.2159>.
- Feeney, Mary, and Leslie Sult. 2011. "Project Management in Practice: Implementing a Process to Ensure Accountability and Success." *Journal of Library Administration* 51, nos. 7–8: 744–63. <https://doi.org/10.1080/01930826.2011.601273>.

- Guimaraes, Anastasia, Lea Briggs, Kirsten Clark, Wendy Tressler Jasper, and Zheng (John) Wang. 2021. "State of Project Management in Libraries." *Journal of Library Administration* 61, no. 6: 644–58. <https://doi.org/10.1080/01930826.2021.1947055>.
- Harper, Val. 2018. "Rightsizing Project Management for Libraries." *Library Leadership & Management* 32, no. 2: 1–11. <https://doi.org/10.5860/llm.v32i2.7215>.
- Özdamli, Fezile, Sualeha Sultan, and Tolgay Karanfiller. 2023. "The Effectiveness of Project Management in Libraries: A Systematic Review." *Information World / Bilgi Dünyası* 24, no. 1: 25–44. <https://doi.org/10.15612/BD.2023.697>.
- Project Management Institute. 2013. *A Guide to the Project Management Body of Knowledge*. 5th ed. Claymont, DE: Project Management Institute, Inc.
- Prosser, Eric. 2024. "Navigating Projects in Academic Libraries: A Scoping Review of Project Management Applications." *The Journal of Academic Librarianship* 50, no. 5: 102929. <https://doi.org/10.1016/j.acalib.2024.102929>.
- Rodrigues, Nuno J. P., and Catarina I. V. Matos. 2024. "The Relationship Between Managers' Emotional Intelligence and Project Management Decisions." *Administrative Sciences (2076-3387)* 14, no. 12: 318. <https://doi.org/10.3390/admsci14120318>.
- Schachter, Debbie. 2004. "Managing Your Library's Technology Projects." *Information Outlook* 8, no. 12: 10–12.
- Serrano, Silvia Cobo, and Rosario Arquero Avilés. 2016. "Academic Librarians and Project Management: An International Study." *Portal: Libraries and the Academy* 16, no. 3: 465–75. <https://doi.org/10.1353/pla.2016.0038>.
- Stanley, Tracey, Frances Norton, and Barry Dickson. 2003. "Library Project Management in a Collaborative Web-Based Working Environment." *New Review of Academic Librarianship* 9 (December): 70–83. <https://doi.org/10.1080/13614530410001692040>.
- Winston, Mark D., and Tara Hoffman. 2005. "Project Management in Libraries." *Journal of Library Administration* 42, no. 1: 51–61. https://doi.org/10.1300/J111v42n01_03.

Robin Naughton (robin.naughton@qc.cuny.edu) is Deputy Chief Librarian and Assistant Professor, Web and Digital Services Librarian at Queens College, City University of New York (CUNY).

Published: January 2026