

Project Management for Law Librarians

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In libraries everyone is involved in projects to achieve goals large and small. Projects do not happen in a vacuum. Rarely if ever does the organisation stand still for a project to happen. Most projects demand the juggling of continuous daily management duties with special tasks. The goal is to experience the excitement of finishing something ... anything!

Project management consists of four phases. Obviously projects must be implemented and completed but defining and planning should also be emphasised.

What is a project?

Basically a project is a finite undertaking that has a start and a finish. A more modern managerial approach defines a project as an undertaking that has a beginning and an end. A project is carried out to meet established goals within quality, schedule and cost objectives.

A project begins when someone reacts to the level of frustration surrounding a problem or weakness, or sees an opportunity to move into a new venture or to develop an existing strength. When a decision is made to do something about a problem or opportunity, a project exists.

How is a project different from other work?

A project exists within a finite life span, whereas departments or libraries expect to exist indefinitely. While this definition is debatable in the current economic climate, it does present a useful comparison.

Projects frequently require resources on a part time basis, whereas permanent organisations try to use resources full-time. This sharing of resources is a potential source of challenge, and even conflict, within the life of the project.

Where did project management originate?

Like velcro and teflon frying pans, project management as a discipline was developed for the US space program in the early 1960's. It quickly found acceptance in government and industry as a way of accomplishing finite jobs.

Whose project?

Some choose projects and others have projects thrust upon them. Involvement in a project may be at a number of levels: as an instigator, chosen manager or team member:

- An instigator devises and controls a project, such as increasing circulation by 20% by next April.
- A chosen manager controls a project devised by someone else, such as moving the library the second floor by next April because Personnel needs the existing space.
- A project team member accepts responsibility for a task such as providing information for a major tender to be presented next Friday

Projects present some unique challenges to the project manager and the larger organisation. These challenges will be elaborated below.

The organisational context

Projects are influenced by the context of the organisation in which they take place. Every organisation has its own style and culture. Failure to consider the culture can spell disaster to a great idea for improvement. When thinking about a project, try answering the following questions. The answers may help determine whether to continue:

- Does the organisation welcome project initiatives or indeed any initiatives?
- What stake has the organisation or upper management in the outcome of the project?
- What resources and support are available?
- How willingly might these be shared by others who need them? How will support for the project be gained and maintained?
- How will new or existing mechanisms be used to report the progress of the project to those not directly involved?

These questions are intended as a caution against trying to change the world without first considering what the world is like. Change what is possible now. That way the project becomes a victory. After completing one project, an even bigger one may suddenly present itself. This new challenge can be met.

The project manager

Organisations need project managers to facilitate defined tasks or projects. Project managers need authority and support from their organisations.

Project management skills include:

- organising
- structuring
- motivating
- gaining support
- setting measurable objectives
- helping to solve problems eliminating waste, time or money
- measuring performance
- using information systems responsively.

The scope for the use of these skills will become clear as the phases of a project are described.

Project management may be an ideal development opportunity for a promising staff member.

Projects in a nutshell: four phases

Projects vary so enormously it seems foolhardy to generalise. However, there is a basic framework.

The four phases of a projects' life cycle are:

1. Defining

- determining objectives
- selecting strategy

2. Planning

- writing specifications
- developing a schedule
- developing a budget

3. Implementing

- verifying standards
- monitoring performance
- taking corrective action

4. Completing

- delivering the output
- finishing administrative details
- evaluating the experience

Phase 1: Defining the project

The Project Team's first tasks are to:

- 1 clarify and agree on the project's definition and scope, including the criteria for determining successful completion
- 2 devise a basic strategy for carrying it out.

This phase will apply whether or not the team members thought up the project. It is critical for the team to spend adequate time discussing and analysing the project so that members are clear on what they are solving and what outcomes are required.

A basic strategy to help the team conceive and define the project consists of five steps:

1. Devise a preliminary project definition and end-result objective This gives concrete direction

For example a vague definition might be: introduce two new relevant sources of information to the library's customers. An objective could be: add two new CD-Rom services to the library by May next year.

2. Generate alternative strategies that might lead to your objective.

Brainstorming with the project team is a useful technique for generating alternatives. Be imaginative and flexible in suggesting strategies.

- 3 Evaluate the strategies and choose one that will meet the project definition and the end-result objective
4. A feasibility study may need to be carried out to test the preliminary strategy and answer the question - will it work? When introducing a new product or service, the market potential must be determined - do the customers want it?
5. A pilot test may be appropriate for changes to procedures, such as new interlibrary loans procedures

If the results of a feasibility study indicate that the project should proceed, detailed planning can begin.

Using the metaphor of a project as a journey, the destination and the route have now been decided. Now every leg of the journey must be planned in detail.

Phase 2: Planning the project

A successful project produces an outcome that performs as expected by the agreed deadline, and within cost limits. The three parameters by which a project is controlled are quality, time and cost. Quality is defined by the specifications, time is defined by a schedule and cost is defined by a budget.

After defining the project and selecting a basic strategy, eight planning steps establish the three basic parameters: specifications, schedule and budget:

1 Break the project down into work steps

Divide the project into steps or units of work that advance the project toward its completion. This structure is the starting place for planning all three parameters of a project (quality, time and cost).

2 Determine the performance standards (measures of quality) for each work step

Write specifications or performance standards for each work step of the project. Include specifications for the quality and type of materials to be used, the performance standards to be met, and the means of verifying quality, such as testing and inspections.

3. Determine how much time is required to complete each step

The overall objective is to determine the shortest time needed to complete the project. Begin with the work steps and determine the time required to complete each one.

4. Determine the proper sequence for completing the work steps and produce a schedule for the total project.

This analysis of duration and sequence will reveal the:

- duration of each step,
- earliest time at which a step may be started
- latest time at which a set must be started.

Some work steps will be occurring concurrently. The project manager may need to rely on other experts to decide how much time is needed to complete tasks.

There are standard tools for recording your schedule and telling others. Examples are Gantt Charts (similar to a sideways bar graph) or PERT diagrams (similar to a flow chart). Having established an order of events the most important task is to make a reliable estimate of the time needed.

5. Assess the cost of each work step and combine the costs into a project budget.

The functions of a budget are to plan the costs of a project and to monitor the costs while the project is in progress. Typical costs include:

- labour (especially if extra staff are involved)
- overhead (percentage of labour cost to account for payroll taxes and benefits for staff working on the project)

- materials
- supplies (tools, equipment, office supplies)
- equipment rental
- general and administrative (management and support services such as purchasing, accounting, etc).

With the cost components identified for each work step a worksheet to tally the costs for the total project can be created.

In organisations where projects are carried out by permanent staff on top of other duties, labour costs are often overlooked. It might be illuminating, next time a project is undertaken, to calculate the actual cost and the real benefit to the organisation

6. Design the necessary staff organisation including the number and kind of positions and the duties and responsibilities of each.

Determine who will be responsible for completing each step of the project as early as possible so that members can participate in the planning of both schedules and budgets. This participation leads to a greater commitment to complete the project within quality, time and cost limitations.

7. Determine what training is required for project team members.

Training and increased opportunities may be viewed as rewards by enthusiastic staff members keen to develop new skills.

8. Develop the necessary policies and procedures

In order to achieve its goals the team must develop internal coherence. Consider developing a team code of conduct with the group. This will state explicitly how members wish to treat each other. Include statements to cover punctuality, honesty, respect or any other aspect of the time spent working together.

Teams often experience a period of internal competition, questioning and distrust before developing a more productive stance. Performing useful work together is a powerful bonding mechanism for a work team

Mathematical formulae or complicated charts may be used for each part of the planning phase. Predictably there is a wide range of appropriate software on the market. Some examples are Mac Project, Microsoft Project or CS Project. Assistance is available from books such as *Project management: from idea to implementation* by Marion E. Haynes. There is also a short course run by AIMA

A word of encouragement. Librarians managing projects are not necessarily professional project managers. Understanding and applying planning principles is more important than using specific tools. If charts and tools seem overwhelming, try listing the work steps and ask the following questions about each:

1. what (materials, standards)
2. how long (time taken)
3. when (what order)
4. how much (money)
5. who (team member).

Answering these questions about each of the steps establishes measurable criteria for the dimensions of quality, schedule and cost.

Planning assures that the project will work but it still has to be implemented. The real journey is now beginning. The project manager becomes the tour leader for the group.

Phase 3: Implementation

During the implementation phase, the project manager co-ordinates all the elements of the project as it happens. Using the detailed plans completed during Phase 2 (Planning) the project manager will be able to determine whether the project is in or out of control. Controlling involves three steps:

1. Verifying the standards or specifications established during planning.

A useful checking and reporting mechanism is a milestone chart. It lists key elements that are clearly verifiable by others. It therefore provides a concise summary of the project. Placed in a prominent position it can provide inspiration by showing the milestones crossed off - on schedule!

2. Monitoring or checking performance

The heart of the control process is monitoring work in progress against the plan. Observation is probably the most common way to check project performance. This involves going into the area where the work is performed and observing what is happening.

Communication between the project manager and those responsible for the various work steps is also important for checking progress. Reports can be group or individual, face to face or electronic. They can also be disseminated to the rest of the organisation to assist understanding and ownership of the project. Communication is a two way process and team members should receive useful descriptive feedback from the project manager.

3 Taking corrective action

Observed progress may not measure up to plan. The project may fall behind in any of the critical dimensions of quality, schedule or cost.

If corrective action is necessary, the project manager may negotiate strategies around:

- allocating additional physical resources
- narrowing the project scope
- lowering the required performance standard
- negotiating for additional time
- making up ground in the work steps remaining to be done
- combinations of these strategies.

Sound communication skills are essential at every stage. All the positive techniques currently used in meetings, staff appraisals and reference interviews are needed by the project manager. Every skill relating to body language, conflict resolution, asking open questions, listening and checking understanding, negotiating win/win outcomes and evaluating results rather than people can be practised in the context of project management.

Phase 4: Completing

This is the journey's end. At last the destination is reached. . . but the photographs must be filed, a new passport should be ordered, and the hiking gear must be washed and packed away.

The goal of the project is to deliver the agreed outcome to the client. When that day finally arrives, there are still activities to be completed before the project is really finished. Activities include:

- writing operations manuals or procedures
- training clients and staff on the use of the project output
- reassigning project personnel (especially if they have been working full time on the project)
- disposing of surplus equipment, materials and supplies
- evaluating the experience completing the final audit writing a project report
- conducting a project review with upper management.

Working on and then completing a project can be an intense and rewarding experience. Mark the completion with some form of celebration or recognition for team members, even if they are exhausted. This official marking of the end can be an important occasion within the life of the project team.

Recapitulation

Here again are the four phases of a projects' life cycle:

1. Defining

- determining objectives
- selecting strategy

2. Planning

- Writing specifications
- developing a schedule
- developing a budget

3. Implementing

- verifying standards
- monitoring performance taking corrective action

4. Completing

- delivering the output
- wrapping up administrative details
- evaluating the experience

Understanding the importance of Definition and Planning to project management is essential. Planning underpins the stages of Implementing and Completing. Working through the four phases ensures the project can be completed to agreed specifications, on time and within budget.

The four phases of project management apply to projects of all sizes and complexity. Projects such as introducing new products, devising new services, automating systems or moving collections can all be organised and controlled in this way. Selection and emphasis of the steps most important to the process ensures that the librarian/project manager remains firmly in control until a successful outcome is achieved.

The definition of project management and outline of the four phases is based on the following recommended book:

HAYNES, Marion E. *Project management. From idea to implementation* (A Fifty-minute Series Book) Menlo Park, California: Crisp, 1989