

project management <http://bit.ly/1ACZ2tW>

what is it?

Project management (PM) is defined by the Project Management Institute (PMI) as “the application of knowledge, skills, tools and techniques to project activities to meet project requirements” (PMI 6).

A project is defined as “a temporary endeavour undertaken to create a unique product or service” (PMI 4).

Therefore, a project is not a part of ongoing operations; it is a separate undertaking that has a definite start and end date. More and more, libraries are undertaking projects to accomplish their goals and objectives.

For that reason, librarians are looking to project management methodologies as a way to manage projects, achieve goals and demonstrate value.



how does it work?

There are several methodologies that librarians can use when managing projects. Two of the more popular are: 1) PRINCE2 which is mainly used in the UK and stands for Projects IN Controlled Environments, and 2) the PMBOK® (Project Management Body of Knowledge) approach, which is the methodology espoused by the Project Management Institute, used more prevalently in North America.

The PMBOK® approach states that there are five phases or process groups in a project:

- Initiation
- Planning
- Executing
- Monitoring and Controlling
- Closing

Certain activities happen during particular phases, for example, writing the project charter occurs during the “initiation” phase, writing the communications plan occurs during the “planning” phase and documenting lessons learned from the experience occurs during the “closing” phase. Note that each phase can overlap – they do not necessarily happen independently of one another, especially in large projects.

who's doing it?

The library literature describes several cases of libraries using PM methodologies to manage their projects. For example, in 2008, the libraries at University of Arizona formally adopted a project planning and management process developed by Brigham Young University (BYU). (See Feeny and Sult in the “Further Reading” section.) They found that the approach they used help them to stay on schedule and keep stakeholders informed throughout the process. Cases of libraries using project management methodologies to great effect have been reported in the literature from universities in the U.S., Ireland, England and Australia. (See Horwath in “further reading” for an overview.)

In Canada, McMaster University Library has been using the Balanced Scorecard Approach to manage projects and achieve goals and objectives from their strategic plan (<http://library.mcmaster.ca/library-scorecard>).

why is it significant?

“Project management” is one of the competencies listed in the 2010 publication *Core Competencies for 21st Century CARL Librarians*, written by the Canadian Association of Research Libraries (CARL) (see page 7). This indicates a growing awareness of the need for librarians to possess skills that allow them to manage projects efficiently while demonstrating stakeholder value. As well, library conferences (e.g., OLA Super Conference) usually feature at least one session on PM. The rising interest in metrics for libraries also indicates a need for a consistent approach to managing the introduction of new programs and services.

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further reading

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Cervone, H. F. (2007). Standard methodology in digital library project management. *OCLC Systems & Services*, 23(1), 30–34. doi:10.1108/10650750710720748

Crawford, L. H., & Helm, J. (2009). Government and governance: The value of project management in the public sector. *Project Management Journal*, 40(1), 73–87. doi:10.1002/pmj.20107

Feeney, M., & Sult, L. (2011). Project Management in Practice: Implementing a Process to Ensure Accountability and Success. *Journal of Library Administration*, 51, 744–763. doi:10.1080/01930826.2011.601273

Horwath, J. A. (2012). How Do We Manage? Project Management in Libraries: An Investigation. *Partnership: the Canadian Journal of Library and Information Practice and Research*, 7(1). Retrieved from <http://journal.lib.uoquelfh.ca/index.php/peri/article/view/1802>

Massis, B. E. (2010). Project Management in the Library. *New Library World*, 111(11/12), 526–529. doi:10.1108/03074801011094895

Project Management Institute. (2008) *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*. 4th ed. Newtown Square: Project Management Institute.

Wamsley, L. H. (2009). Controlling Project Chaos: Project Management for Library Staff. *PNLA Quarterly*, 73(2), 5–6, 27.

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what are the challenges?

There are a few challenges to using a PM approach in libraries:

- 1) When determining how to manage a project, the size and complexity of the project must be considered. A small project does not warrant as much management, monitoring and control as a large project that has a long timeline, a large budget or many stakeholders involved. Determining the best approach can be challenging as project management is definitely not a “one size fits all” solution to achieving project results and approaches for smaller projects are not so well defined as those for larger ones;
- 2) Introducing a PM approach into an organization that does not have a PM methodology in place or staff familiar with the concepts can be challenging - PM presents a new way of managing work. Staff training, development and time are required to learn the methodology before it can be put in place properly and these can present costly barriers to PM introduction.

where is it going?

Project-based work in libraries is on the rise for several reasons:

- there has been an increase in technology-based work in libraries; for example, the implementation of ILSs, digital repositories and open source systems;
- there has been a recent increase in library building and facility projects in libraries
- there has been a need to collaborate with outside partners more frequently, such as centres for teaching excellence in academic libraries or the municipality in the case of public libraries (Wamsley, “further reading”, 5).

These types of projects result in the need for a clear, transparent method to manage the work, control shortfalls and risks, and communicate to all stakeholders involved.

Project management as a methodology has existed since the 1950’s and began in the manufacturing and engineering fields. More popular in the private sector, it has been gaining traction in the public sector for several years (e.g., Crawford in “further reading.”) As libraries become partners in larger, more involved projects within their communities, there is likely to be a greater reliance on PM methodologies to reach successful outcomes. Also, as libraries integrate assessment measures, success metrics and transparency in their operations, there is an emerging requirement for consistent, transparent and proven approaches.

what are the implications for libraries?

As libraries face budget constraints and cutbacks, librarians are looking for ways to assess progress and demonstrate value to library stakeholders. Project management is one strategy for accomplishing these goals as controlling scope, planning in quality, managing risks and reporting progress are parts of the methodology.

Therefore, PM is one item in the librarian’s toolkit that can be used in the conversation on the value of academic libraries, and libraries in general.

All OCULA Information Briefs are available at <http://bit.ly/1IKV9Jt>