

CHAPTER 1

Project management

Introduction

It is likely that one of the first things you do in a new professional role is to get involved with project management. Perhaps your workplace is running a project your managers would like you to get involved with, or someone has asked you to manage a small-scale project. You might be specifically employed to do project work – there are frequently project-based roles in library and information science (LIS), which may appeal especially to early career professionals. Those in these roles frequently have short-term contracts (of a year or less), and allow you to gain experience in different areas of LIS work. There may also be the chance to turn a project position into a permanent role with your employer. Your project involvement might be:

- managing a project that you are undertaking
- working as one of a team on a project someone else is managing
- managing a project that a team is working on.

These projects might be formal or informal, work-based or external. Allan (2004, 6) classifies projects into the following categories:

- strategic or operational
- simple or complex
- local or distributed
- having 'hard' or 'soft' outcomes
- fixed or changing the environment.

Whatever the type of project, they will all have certain things in common.

What is a project?

A project is a task, which has the following characteristics:

- *start and end dates*: so it is completed within a certain time span, defined in advance
- *measurable goals and outcomes*: what the project is to achieve
- *a budget*: with an allocation of resources, including money, time and staff.

The success of a project is measured by these characteristics: a successful project is one that is completed on time, within budget, and achieves its goals.

Project work frequently requires you to collaborate across departments and disciplines. While projects might just involve library or archive staff, it is more likely that they will also require the involvement of other departments, such as finance, information technology (IT) and human resources. The ability to liaise with staff from different departments is a core skill required for project work.

Although projects can be large and complex, they can also be small-scale and relatively simple. These are some examples of possible LIS projects:

- implementing radio frequency identification (RFID)
- moving stock and services to a new room or building
- digitizing a collection
- designing and building a website
- undertaking a retrospective cataloguing conversion project (moving paper-based catalogues onto an electronic collection-management system)
- designing an induction programme for new students or staff
- purchasing a new collection management system.

Finding project work

Positions for people to work on or manage projects are often advertised through recruitment agents or on mailing lists. Sometimes it is spelled out that the job involves project work; other times you may need to follow the clues in the job description, as in the example in Figure 1.1.

Figure 1.1 is a good example of typical LIS job advert for a project position. Note that although the activity is called a programme rather than a project, it shows all the characteristics of a project: it has a fixed duration (the interview date is Friday 26 August 2011; it is a fixed term post up to 31 March 2012),

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Dear All

Please find attached details of an exciting vacancy at Tate Archive, Tate Britain, London. Details of how to apply online are given below.

Post: Archive Cataloguer

Reference: TG0050

Band: Specialist

Salary: £22,900 per annum

Contract: Fixed term to 31 March 2012

Location: Tate Britain, Millbank, London SW1P 4RG

Tate Archive is a major national resource comprising the Archive of British Art since 1900 and Tate's institutional records. The opening of the Hyman Kreitman Reading Rooms in 2002 and the launch of our catalogue online has created excellent access to Tate staff, academic researchers and the public.

We have embarked on an ambitious programme to completely catalogue our 800 collections with just 22% of the total remaining to be listed. To help us achieve this aim, we are seeking an enthusiastic archive cataloguer to join the team of six in a fixed term post up to 31 March 2012.

You will be responsible for sorting and cataloguing the papers of the art critic David Sylvester, and other selected collections, according to ISAD(G) and in-house standards, entering records onto CALM and generating lists for public access. You will also participate in the delivery of services to researchers.

You will hold a postgraduate diploma or MA in archive administration or equivalent experience. You will also have experience of archive cataloguing and familiarity with ISAD(G). A high level of accuracy and good IT skills are essential.

For more information and to apply using our online system, please visit www.tate.org.uk/about/workingattate

Closing date: Friday 19 August 2011

Interviews: Friday 26 August 2011

Figure 1.1 *Sample job description for a post at Tate Archive*

measurable goals and outcomes ('completely catalogue our 800 collections with just 22% of the total remaining to be listed'), and a fixed level of resources (team of six). This advertisement was posted on the Archives-NRA (National Register of Archives) list in August 2011, and reproduced by permission of Tate.

Why projects?

Defining something as a project allows you to make changes and developments in a structured way. Project management tools and strategies can help to maximize staff and stakeholder buy-in, and measure, record and report on outcomes.

What skills does project management involve?

Project management fits well with the traditional LIS skill set, as it is heavily based on managing information, time and resources. Project management is a transferable skill, and can help you find employment in non-traditional or non-LIS sectors, as this case study from Annette Earl, a change facilitator, shows.

How to . . .

Get started with project work

I began my professional career as a public and school librarian, before taking on the role of project manager within the medical higher education environment. The primary remit of my role is to help develop and deliver new postgraduate courses for doctors and dentists, as well as devise and oversee the processes and procedures that accompany this. The work is multidisciplinary and requires me to work across sectors and teams within the organization, and to form constructive, positive relationships with external partners.

Project management requires a good understanding of how things work at both the strategic and operational level, and many of the skills I had acquired as a librarian were quickly utilized within the project management environment. For example, the need to source, collate and organize large amounts of information and disseminate to a variety of users was something I had previous experience of. Project management is essentially the process by which a number of outcomes are achieved based on working within set criteria. Accuracy and relevance of information are crucial to the successful outcome of a project; an information professional is easily able to translate their skill set to do this.

These are some suggestions to help get you started.

Learn the project management language

It is always possible to become more professional, and adopting the terminology

of a discipline is one way of doing so. Learning the specific terms used in project management demonstrates an active understanding of the professional area in which you are working and allows you to communicate in a common language with those outside your immediate professional environment.

A great place to start to understand what project management is, how it works and how you can apply it to your own situation is the Association for Project Management's (APM's) book *Starting Out in Project Management* by Ruth Murray-Webster and Peter Simon (2006). This is a seminal text and is worth investing in for the glossary alone.

Attend conferences and events outside your normal scope

A conference about knowledge management or library services will almost certainly contain some emphasis on project management but may be packaged differently from those you are familiar with. Look at conferences outside your specific sector and you may be surprised at how many relevant events there are. They need not be expensive; Project Challenge runs twice a year, is free and runs sessions relevant to all those working in the information profession. Details can be found at www.projectchallenge.co.uk.

Self-study your way to project management

While project management has its own formal training structure and career path, it is not always desirable or necessary to learn about project management through expensive training courses. There are a number of online resources available to help you achieve a thorough and comprehensive understanding of project management, if you are willing to spend a little time and energy on adopting a self-study approach. There are numerous websites, organizations and publications dedicated to project management.

Read

I have mentioned it already but I cannot recommend it highly enough! The text by Ruth Murray-Webster and Peter Simon, *Starting Out in Project Management*, really should be the first port of call for any aspiring project manager, and is an excellent reference book covering all the basic tenets of project management.

Know

Any of the following websites provide a useful entry point to project management as a professional discipline:

- Association for Project Management (APM), www.apm.org.uk
- Project Management Institute (PMI; UK Chapter), www.pmi.org.uk
- Project Manager Today, www.pmtoday.co.uk.

Supplement

It is helpful to supplement the professional organizations websites by visiting those that provide a more practical basis for your learning. These are some of the best:

- Business Balls, www.businessballs.com
- Mindtools, www.mindtools.com
- the Open University's Openlearn, which offers a number of free modules specifically relating to project management, <http://openlearn.open.ac.uk>.

Do!

- Many of those reading this book are likely to be using project management in some way – it is important to make this visible and tangible to managers and colleagues if it is to be recognized:
- When writing reports, use project management terminology; this immediately adds credibility and professionalism to the work you already do.
- Many of the foundations and principles of project management that are taught on project management courses can be learned through self-study; use the information freely available on corporate and professional organization websites to develop and enhance your project management knowledge.
- Mind map the processes, activities and tasks that make up your current role. Now overlay the basic project management process; see, you are probably already a project manager!

Since becoming a project manager I have acquired and developed a number of transferable skills. Perhaps the most obvious and tangible benefit has been the acquisition of professional qualifications such as the APM Introductory Certificate

to Project Management and PRINCE2 and change management qualifications. I have learned the language of project management, which has enabled me to converse with colleagues in a clearer and more helpful manner than I had in the past, especially with those from a different professional background.

I have also been able to gain a different perspective on the value of information, and how its needs and meaning can alter according to audience and purpose, which I believe has made me a better information professional. I have found it reassuring to discover that there is a formal process for my natural way of thinking and I strongly believe that the information profession and project management profession are complementary partners to achieving organizational objectives. The most successful people are those who recognize the importance and natural overlap of both.

Methodologies and tools

Annette has given us a general introduction to project management, and how your information professional skills can translate to those of project management. There are a number of tools and methodologies available to help with project management, and this section gives a brief introduction to some of them. Always keep in mind the scope and resources of the project and the aims of the organization when choosing a tool.

Formal training

PRINCE2

If you are planning to do a lot of project work, you might consider PRINCE2 training. PRINCE2 is an internationally recognized standard, used extensively in the UK public sector. It sometimes is listed as a required or desired skill for those applying for (usually high-level) project management positions.

There are two levels of PRINCE2 qualification: Foundation and Practitioner. Training can cost from £500 to £1500, and requires the commitment to attend a multi-day course, or complete an online self-study course. New professionals who are only undertaking small amounts of project management and have to pay their own course fees might find it difficult to justify paying for a PRINCE2 qualification. If your job requires a lot of project management, your organization may pay for training.

Other training

As well as the general training providers mentioned by Annette in the case study above, a number of LIS training providers provide introductory courses to project management, with an emphasis on the information and cultural heritage sector.

In the UK, ASLIB runs a one-day project management course, looking at planning and implementing library and information projects. See www.aslib.com/training/courses/course.htm?eventid=19.

In the USA, the Society of American Archivists runs a course on project management for archivists. See www2.archivists.org/prof-education/course-catalog/project-management-for-archivists.

Professional organizations may run project management training from time to time. This may be subject to demand, so if you can't find a course in your area, it might be worth contacting relevant organizations to express an interest. Larger organizations such as universities might run internal training courses on subjects such as project management. These are likely to be general introductions, and may not be tailored to the LIS environment.

It is also worth looking for online courses. The American Library Association (ALA) offers a self-directed project management e-course at www.alastore.ala.org/detail.aspx?ID=2965 (priced in autumn 2011 at US\$55). The Georgia Library Association Carterette Series of webinars are freely available for download at http://gla.georgialibraries.org/mediawiki/index.php/Carterette_Series_webinars_Archive; they include an introduction to project management as well as other great topics including digital rights management, podcasting and transliteracy.

Tools

You may already be familiar with some of the tools of project management – others, you might not have come across. Here is a brief introduction to some of the most commonly used tools.

Software

There are a number of software packages available to help you manage projects. Products such as Microsoft Project can be costly, and may only be available to you if your organization has a licence. You may prefer to use an open source, software as a service or freeware product. Wikipedia has a useful

page comparing features of many different software packages, which may help you find a package that suits your needs and budget. See http://en.wikipedia.org/wiki/Comparison_of_project_management_software.

Remember that a package that is suitable for a large-scale project may not be as suitable for a smaller project, and that learning to use each set of software will require you to invest time and effort.

Mind maps

Mind mapping can be a useful tool to help you start planning a project. It allows you to move away from a linear approach, and capture all the tasks and potential difficulties associated with a project.

There is mind-mapping software available, but this isn't necessary – mind maps can be low-tech, requiring just a pen and paper.

The mind-mapping website www.mind-mapping.co.uk/mind-maps-examples.htm has some useful examples. Figure 1.2 shows a hand-drawn mind map by Lyndsay Rees-Jones of Real Time Release.

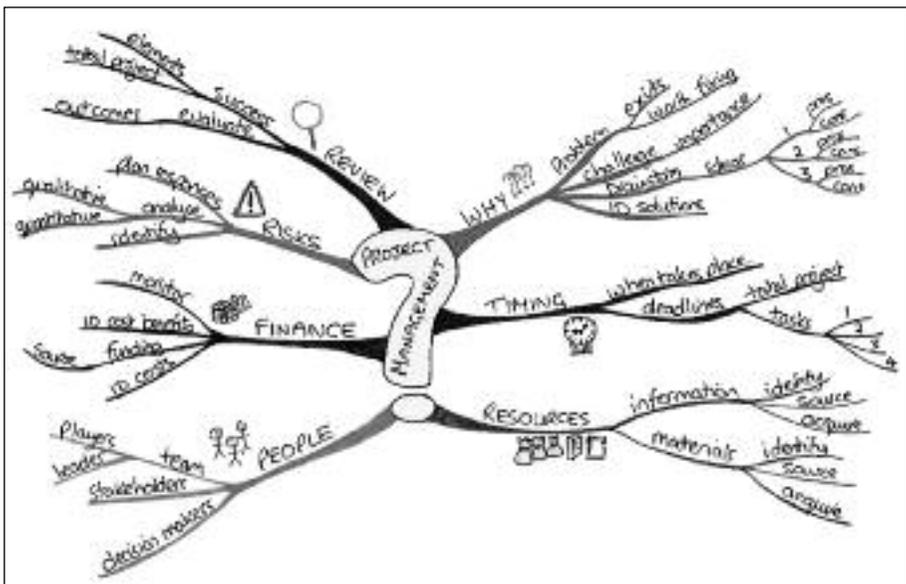


Figure 1.2 Hand-drawn mind map by Lyndsay Rees-Jones of Real Time Release, <http://real-time-release.co.uk>

| | | | | | | |
|------------------------------|--------|--------|--------|--------|--------|--------|
| Choose project team | | | | | | |
| Communicate with users | | | | | | |
| Enter changes into catalogue | | | | | | |
| Print new barcodes | | | | | | |
| Print new spine labels | | | | | | |
| Relabel Bay 1 | | | | | | |
| Relabel Bay 2 | | | | | | |
| Relabel Bay 3 | | | | | | |
| Check shelving and labelling | | | | | | |
| | week 1 | week 2 | week 3 | week 4 | week 5 | week 6 |

Figure 1.3 Example of a Gantt chart

Gantt charts

Gantt charts allow you to express time-critical activities visually, and to plan workloads. Activities are often expressed as elements of a bar chart, with tasks on the y axis and duration on the x axis, such as in the example of a reclassification project shown in Figure 1.3.

A similar process is critical path analysis, which involves finding the key elements of a project by mapping out dependencies, durations and earliest or latest start or finish times.

Although these tools can be useful, you don't need formal project management training to run a successful project. Follow Hannah Green, archivist at Seven Stories, as she talks about the challenges of running a project that is very much in the international eye.

Case study The Blyton Project

The estate of Gillian Baverstock, Enid Blyton's elder daughter, put a large collection of material up for auction in September 2010, including original typescripts for numerous books, some original artwork and books. Seven Stories was made aware of the auction about one month before it took place – we knew we definitely wanted to acquire some, if not all, of the material. We are working towards building a collection of national significance, which documents the development of modern children's literature, and Enid Blyton has an undisputed place in such a collection. Her name also consistently came up in visitor surveys as the person visitors would most like to see an exhibition about, so we knew there would be a great deal of public interest in her material.

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We knew that external funding would be required to support the acquisition of this material. Because of the short notice, we had little time to apply for funding, so the project bid was put together very quickly and without knowing exactly what material we might end up acquiring from the auction! The lack of records of any previous sales of original typescript by Blyton at auction made it very difficult for us to estimate the likely sale value of the typescripts – relatively little of Blyton’s draft material has survived, so there was no point of reference for previous sales of similar material. We were very aware that there would be a lot of interest from Blyton collectors which might also drive the price up at auction. This meant we didn’t really know how far any funding we might be able to raise would actually stretch at the auction. Funding applications to the V&A Museum and the Museums, Libraries and Archives Council purchase fund and the Heritage Lottery Fund were successful – these bids were not only for funding to purchase material, but also covered costs of repackaging and preservation, and a programme of public events and activities making the Enid Blyton material accessible to the public. The funding bids included a strong element of online engagement, proposing a cataloguing blog, and developing access to the original material online via the Seven Stories website.

After the successful funding bid, Seven Stories was able to secure at auction typescripts for 13 of Blyton’s novels, along with some short stories; some personal books and papers belonging to Gillian Baverstock, including her childhood diary; merchandise and other ephemeral material relating to Blyton’s most popular series; and some printed books. Overall management of implementation of the project lay with the collection director, with the main workload split between the archivist and the events coordinator. The archivist had primary responsibility for managing the cataloguing and digital element of the project, while the events coordinator had responsibility for public events and access.

Some elements of the project were extremely straightforward – cataloguing took place relatively quickly, and it was very easy to set up a cataloguing blog on Wordpress (<http://blytonsevenstories.wordpress.com>) to disseminate information about cataloguing and repackaging as it was going on. This blog was promoted via relevant mailing lists, and through the Enid Blyton Society website, tapping into existing online communities of Blyton fans rather than trying to generate new audiences. It was also promoted via Seven Stories’ presence on Twitter and Facebook, with Twitter proving a particularly successful method of driving visitors to the blog. The blog was undeniably successful but had a significant impact on workload, as keeping the audience engaged and regularly visiting the blog required new posts at least twice a week.

Other elements of the project proved more challenging. Plans to make material available online had to be significantly revised to accommodate the concerns of the copyright holders. Our project proposal outlined a desire to make full manuscripts available online, and this could have been relatively easily achieved through Flickr. However, the rightsholders refused permission to make full works available online, and raised significant concerns about the security of images made available via Flickr. Consequently, we have only been able to make single images from each typescript available via our website, in the catalogue and on a page dedicated to the Enid Blyton archive.

Despite such challenges, the project did have several very positive, unexpected outcomes. The discovery of the typescript for an unpublished novel by Blyton, *Mr Tumpy's Caravan*, was publicized through the cataloguing blog. After the BBC picked up on the story, it spread very quickly both nationally and internationally, creating a huge amount of publicity for Seven Stories and the Blyton archive. Further, significant donations of material have also been made to the archive by Sophie Smallwood, Blyton's younger daughter since we acquired the typescripts at auction. These subsequent donations, along with the material originally acquired at auction, will form the core of an exhibition dedicated to the work of Enid Blyton. The most exciting, and unexpected, outcome was the establishment of a new £34m fund to benefit the work of Seven Stories, founded thanks to the Enid Blyton Trust for Children. Its Trustees decided to wind up the Enid Blyton Trust for Children and donate its assets to set up a permanent fund to support the work of Seven Stories.

Conclusion

Hannah's case study highlights many important aspects of project management:

- *time constraints*: the funding bid was put together in less than a month
- *team responsibilities*: the workload was split between three team members, each with responsibility for a certain area
- *impact on workload*: greater than expected, due to public interest in the blog
- *unexpected challenges*: because of copyright concerns original plans for digitization had to be shelved.
- *the whole team can benefit from project management techniques*: Hannah wasn't the project manager – she was a project team member – but she's

learned enough to write this case study, and obviously feels highly involved with the project.

In *Project Management* Barbara Allan talks about not needing to use complex project management tools for simple problems: ‘[It] is rather like taking a sledgehammer to crack a nut. The time spent using the methods would be better spent working on the project’ (2004, 7). Whatever project management tools you choose to use should be suitable to the project at hand – balance the benefits of proper planning with the time and resources available, and the risk factor of the project. Getting into the mindset of choosing the appropriate project management tools for simple projects will help you when it comes to bigger projects. You don’t need to carry out a Gantt chart or a critical path analysis for everything, but think about planning your time and resources, and prioritizing and delegating tasks where required.

You will never be able to plan for all the challenges you might face, but having a plan in place, with allowances for slippage, will make it easier to deal with challenges when they arise. Planning and delivering successful projects will improve your productivity and time management skills, benefiting you in all areas of your career.

References and further reading

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➔ **Over to you . . .**

Think about a project you have been involved in. Did you use a project management technique? How might doing so have helped?

Choose a project management technique, and write short plan (c 300 words) of how you might apply it to a project you are involved in. This can be any work or study related project – writing your dissertation definitely counts! Think about:

- time spent planning vs time saved in execution; a simple, low-risk project will require a less-detailed strategy
- the nature of the project: how many people are involved? What sort of flexibility is there?