Project Manager's Group Meeting
DLF Fall Forum
3 Nov 2012

!Twitter hashtags: #dlfpmg #dlfforum

Introductions - interesting diversity in job titles
Evolving roles -- possible theme for next year

Session #1

Joan Starr (CDL) presentation

SWOT-style discussion on Working collaboratively on projects across organizational boundaries / Managing cross-institutional projects

[Version #1 notes for this session]
Strengths
cdl serves all 10 campuses
trend today is for libraries to collaborate/work across units including outside library and with other Institutions
Joan had training in collaboration decision making
willingness to fund collab projects
leadership in Open Source development
experience with social networking tools
grant writing experience
street credit for successful grant implementation
knowledge of campus needs

Weaknesses
lack of resources
time
entrenched habits
scarcity of qualified people
inequity in sharing out work
diff org. cultures
Lang barriers
time zones
need for common decision making
diff levels of bureaucracy
diff in writing specs

Opportunities
potential to share money
opening up to new ideas
gain access to new expertise
able to provide better products/services
promote use and visibility of digital objects
learn from everyone's mistakes/lessons learned
look better to funding agencies
access to resources we don't have; to each other's resources
broader leadership support; rising tide lifts all boats
experience from collaboration facilitates future projects and promotes development of skills

Threats
loss of reputation
left holding the bag
loss of control
   Tech solutions
    Scope
exceeding ability to follow thru
being held accountable for services we are not solely in charge of
being in management matrix/ shared management

Summary
What projects would benefit from collaboration?
What do we each want to do that we can't do on our own?
Be involved in writing MOUs from beginning

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[Version #2 notes for this session]
Research libraries looking at taking advantage of economies of scale and collaborating at large scale across multiple institutions.
How well are we positioned for this?
Group activity: SWOT analysis

STRENGTHS
- Experience in collaboration
  E.g., CDL sent Joan to collaborative decision-making training
- Willingness to commit resources to projects
- Ability to provide leadership in various communities (University consortia, the open source community, etc.). Not just lurking.
- Experience with social networking (e.g. remote, international collaboration)
- Experience in grant writing
- "Street cred" in terms of executing funded grants

WEAKNESSES
- Money, resource limitations
- Time as a particularly limited resource
- Entrenched habits (e.g. "always done it alone")
- Emerging field, scarcity of skilled staff
- Worry about partners, lack of good partners
- Working across a variety of organizational cultures or profiles (size, language, mission, etc.)
- Time zone differences
- Governance -- need for common decision-making
- From a commercial perspective: libraries tend to struggle to create thorough technical specifications

OPPORTUNITIES
- Potential to save money - e.g., shared infrastructure costs
- New ideas
- Gaining access to new expertise
- Creating better products
- Promoting better visibility of collections (through combined collections)
- Learning lessons from each other's experiences
- Attracting more support from funding agencies/foundations
- Access to each other's resources
- Creating a climate of change and leadership
- Momentum - synergies of bringing experts together

THREATS (what have you got to lose?)
- Reputation
  - Need to acknowledge that we will be held accountable for negative experiences that may be beyond our control
- "Left holding the bag"
- Loss of control (or maybe a change in the character of maintaining some control)
  - Technical solution
  - Scope
  - Management

Session #2

Project portfolio management tool tips

[Version #1 notes for this session]

Presenter #1
Kat Hagedorn, UMichigan

"Modifying GQueues"
https://www.gqueues.com/

Presentation is here:
http://prezi.com/pxkjli2f95-l/never-a-silver-bullet-when-you-want-one-modifying-gqueues-as-a-pm-tool/

Had previously used Basecamp, Things, Google Sites, etc.

GQueues is dependent on gmail or other sources of info
Ability to organize list items into two levels of groupings
Refers back to original emails
Some issues with editing within GQueues or adding emails with non-descriptive subjects
Personal organization--no way to share (in free version)

Presenter #2
Cristela Garcia-Spitz, UC San Diego
Confluence

UCSD created project templates with details, milestones ("Planning & Analysis,"
"Implementation" and "Completion"), project status, issues and risks listing.

The template allows the creation of a report with all project timelines (as a bar chart), list of
projects with manager and other metadata.

Confluence costs money, so this was a good trial, but not sure if it will continue
Used a number of Confluence plug-ins.

Background:
Confluence = Knowledge management tool for sharing & organizing information, as well as
fostering collaboration
UCSD Library started using Confluence in 2009
Since then, content and uses has been growing...there are currently over 50 different spaces in
Confluence at the UC San Diego Library.
Created the project template in January 2010 as a way to incorporate project planning into
Confluence.

Goals:

Make planning & executing a project easier
Provide the foundation for project planning, scheduling, & resource allocation (not to mention risk management)
Transparency & consistency across projects
Report out on progress

Demo:
DLP Home
DLP Projects Portfolio (Active Projects)
Sample Project
Sample Project Plan

Key Features & Potential Benefits:
Define the scope & list the milestones of the project (or WBS - Work Breakdown Structure)
Bring out assumptions and raise critical issues early on
Delegate tasks and responsibilities, create accountability and commitment for specific project tasks
Document work and measure progress
Portfolio provides snapshot across projects
URL to each project page
        NOTE: Requires effort and continual refinement to keep it up-to-date and useful.

Pros:
Integration: Allows for consistent project documentation in an existing system used in the Library.
Data entry using the templates is very simple and direct.
Structured data allows for compiling and presenting data in new/interesting ways
Using data fields such as Strategic Direction allowed us to create a custom Dashboard showing all projects in Confluence organized by Strategic Direction.

Cons:
Third-party plugins now require a commercial license and are relatively expensive.
The plugins are on the critical path for Confluence upgrades.
Limited functionality compared to software specifically geared towards project management.

Core Plugins used for UCSD Confluence Project Template:
Scaffolding: http://www.customware.net/store/plugins/confluence/scaffolding_plugin.html
Use: To create the PM template.
Linking: http://www.customware.net/store/plugins/confluence_plugins/linking_plugin.html
Use: To create "live" links to the PM template. So if we add an "On Hold" phase option, all current PM pages using the template inherit the change.
Reporting: http://www.customware.net/store/plugins/confluence_plugins/reporting_plugin.html
Use: To create the table view for a quick glance at all projects.

Graph: https://studio.plugins.atlassian.com/wiki/display/CHRT/Gantt+Charts
Use: To create a graphical view of the start date and revised due date for all projects.
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Presenter #3
Jason Casden, North Carolina State Univ
[Basecamp](#)
[Trello](#)

Older Version of BC:Messages, files attachment, milestone creation in calendar, overview for status of all projects
Newer Version: more scaled back, to do lists, text documents, and milestone dates

One of the problems with basecamp was that folks would send messages through basecamp, and sometimes messages through email: too inconsistent, hard to organize in one place

Trello focuses on organization of work (BC strength is communication)
Add cards and move them through: to-do, doing, done. Very task oriented. Works well with software development projects.   Can move cards easily btw projects.

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[Version #2 notes for this session]

Presenter #1 - Kat Hagedorn, Univ of Michigan

Modifying GQueues to use as a Project Management tool
collections
projects
über collection management

Other tools she has used
Basecap
Google Sites
Things
Paper
Microsoft...

GQueues lite - free version
Use in conjunction with Gmail
Forward emails to GQ
Annotate by adding to email subject line
can send things from lots of different tools

not ideal, but works

Presenter #2 - Cristela Garcia-Spitz, UC San Diego

Using Confluence for Project Planning - Cristela; not free
create a page for each project using a template
   Project details
    Milestones
        Planning
        Implementation
        Completion
    Project Issues and Risks
Project List
   Create a graph of project timelines

Presenter # 3 - Jason Casden, North Carolina State Univ

Basecamp and Trello Jason NCSU use for project communication
Basecamp - user friendly, small fee
 dashboard, To-dos, Calender
Using Google docs for documents and regular email
not using to track milestones
To dos -are not well connected

Moving to Trello increasingly, free
Projects with boards which have cards
Boards.   Xxxxxx, Bugs/Issues; Todos; Doing; Done
Cards have comments, attached files, due dates, checklists, drag cards to other boards as status changes
can move cards to another project
Trello.com for user community

Session #3

breakout scenarios
Scenario 1 - Project to digitize 100,000 items held in foreign archive
Scenario 2 - Fee-based digitization project for an external customer

Wrap-up

Give feedback to Lois and Cathy (pros & cons of this mtg): http://bit.ly/TBbsiV
Also, ideas for next year