

Closing the loop: Project Assessment and Leveraging Goals for Future Planning
Webinar Outline - Draft Version 1.0
08 January 2017

Presented by Ellen Ryan

Live Webinar: Wednesday February 15, 2017

I. Introduction

a. Joy Speaker introduction and platform information (2-3 mins)

Hello! My name is Joy Banks, and I am the Project Coordinator for the CLIR Strategies for Advancing Hidden Collections six-part webinar series. Welcome to our sixth and final webinar, Closing the loop: Project assessment and leveraging goals for future planning. This series is offered through the generous support of The Andrew W. Mellon Foundation.

Please review the items in the housekeeping box for technical information. As a reminder, if you have any technical issues during the event, please send a private message to Louise Gruenberg. If you are viewing this as a group, please send a private message to me with your group count. Please keep in mind that the webinar is being recorded, including the audio, slides, and chat. Recordings will be sent to the registered participants as soon as they are available.

[Joy move to classroom and intro slide]

It is my pleasure to introduce our speaker for today, Ellen Ryan. Ellen has served as the Head of Special Collections and Archives at Idaho State University since 2013. Prior to her time at ISU, Ellen spent two years as Digital Project Manager on a highly collaborative LSTA Digital Imaging Grant at Kent Library, Southeast Missouri State University developing a digital repository of primary source materials pertaining to the American Civil War. Previous positions included working in historic preservation, where Ellen was charged, in part, with building relationships with the town and county historians, historical societies, and museums in the Adirondack region of New York. Ellen has worked as a consultant and served on the boards of several historical associations and museums.

Ellen received her MA History from Southeast Missouri State University and a MLIS Archival Studies from San Jose State University. Please welcome Ellen.

[Ellen assumes control of slides]

[slide 2]

II. Overview and objectives (10 mins)

i. Thank you for the introduction, and good afternoon to everyone. I am excited to be here with you today, and welcome to the final installment of the series, *Strategies for Advancing Hidden Collections*. The scope of this topic, *Closing the Loop: Project Assessment and Leveraging Goals for Future Planning* will address:

- Process of project goals and assessment

- Determining useful metrics for a project
- Sharing methods for tracking metrics, progress, and time
- Adapting to project roadblocks and unanticipated changes to the project
- Defining and celebrating project success with staff, management, and the community
- Setting new goals built on previous projects

We will approach this session in a similar fashion to the previous ones, in that I will be asking you to participate from time-to-time, by asking questions and soliciting your responses. I will also be referring back to some of the earlier sessions, as well as using examples of projects I have worked on and am currently working on in order to provide you with some real-life scenarios. Even though the examples will pertain to archival projects, they can easily transfer to library, gallery, or museum collections.

[slide 3]

By the end of this webinar, you will:

- Know how to set measurable goals and determine project success
- Have the tools needed to track project progress
- Be able to communicate goals and outcomes with various audiences
- Feel confident about project progress, even when things do not go as planned

MOVE TO LOBBY

When you first entered the lobby for the webinar there were some polls we asked you to take. If you have not done so already, I am going to pull them up here so you can respond now. [Ellen takes everyone back to lobby]. We are going to take a quick look at those to get a better feel for where everyone is in terms of project management.

[Respond to answers from lobby poll]

[Ellen returns to classroom]

Now that we have a better understanding of who is working on projects, or about to start, and who has/has not established their goals. We have also learned that some of you (or not) have adjusted or changed your goals once the project started. We will talk about this a little later on when we talk about roadblocks and unexpected changes in our projects. But first we are going to talk about project goals and assessment.

[slide 4]

III. Project Goals and Assessment (10 mins)

No matter the project, all projects have a goal. The four cornerstones of a project goal are:

- Time
- Target
- Budget
- So what?

“Time” is as simple as deciding how long the project is going to take

“Target” refers to, what will the project look like? What will it result in?

“Budget” needs to be determined by asking, “how much will it cost?”

“So what?” means answering the questions: why are we doing this? What problem will it solve?

This can be addressed as a needs assessment – is there a need for the intended project, and if so, what problem will it solve? The “so what” question can help with the prioritization of your projects, and keep your project in line with your institution’s mission.

Example: “Remodel the Library to provide for one community room and two small study offices by the end of FY 17 at a cost not to exceed 1.8 million dollars so that the community has a free meeting space and the library can offer entertainment, instructional, and training programs on a regular basis.” This example addresses all four cornerstones of a project goal: time, target, budget, and the ‘so what?’.

Your project’s goal can be as simple as processing a collection quickly by applying MPLP to make it more readily available to researchers, or as complex as a collaborative digitization project with several institutions that involves locating, digitizing, and transcribing documents and making them accessible via a content management system (CMS), or creating an exhibit that highlights your hidden collections. Regardless of the nature of the project, make sure your goals address the four cornerstones. For those unfamiliar with MPLP, in 2005, archivists Mark Greene and Dennis Meissner published their article, "More Product, Less Process: Revamping Traditional Archival Processing" in *The American Archivist*, which called for a reduced investment of time and processing at the individual item level for the sake of speeding up overall collection processing. The "More Product, Less Process", (MPLP) method was developed specifically for 20th Century collections, but has been applied to older collections more-or-less successfully.

[slide 5]

You should revisit your project goals and assess them as you move along through your project. Continually remind yourself of what you stated as your goals, and stick to them. If it means pulling out that accepted grant proposal or your notes from an earlier meeting, to remind yourself of what you committed to, do it. Otherwise, you can easily become sidetracked and steer yourself off course, which can result in loss of time and focus on the initially stated goals, and, you will have some explaining to do to your stakeholders. There may be times when the stated goals need to be readjusted, such as when/if there is staff or volunteer turnover, or budgeting issues arise. Do you remember the images from the first webinar of the project manager and the seesaw? It is always a balancing act.

If you are working on a grant-funded project that requires interim reporting as well as a final report, you will be looking at your goals on a more regular basis, documenting your progress, and reporting to the fiscal agent.

What do we mean by assessment?

[slide 6]

Project Assessment

When projects are not running smoothly, the focus can quickly shift to become delivery at all costs which can then lead to a downward spiral that includes poor quality, inefficiency, late delivery, and poor predictability. Assessing your project as you move forward until its completion will keep you on task and focused.

[slide 7]

***Activity #1: Signs of trouble**

It is now time for our first activity! Similar to the previous webinars you have participated in with this series, I am going to put some questions out there so that we can learn from everyone else's experiences, utilizing the chat box on the left of the screen to facilitate discussion. We will spend five minutes on this activity; chat comments will be captured as part of the recording in case there is something you want to refer back to later.

[[Ellen moves to Discussion 1.

Joy sets room timer for 5 minutes. Joy gives verbal time reminders as needed.

The first question (5 mins): What are some problems you have encountered when working on projects?

[Respond to answers]

Ellen moves back to classroom.]

[slide 8]

What are some signs your project could be in trouble?

- Too broad of a scope
- Failure to meet user needs
- Lack of re-engineering and re-definition of job roles and responsibilities
- Lack of clear goals
- Too many leaders
- Too much reliance on outside consultants
- Lack of contingency plans
- Inadequate testing
- Inadequate user training
- Denial that the project is in trouble

[slide 9]

IV. Determining useful metrics for a project (10 mins)

Without measuring, it is impossible to know whether a project was a success or a failure without having measured its effectiveness.

Project management metrics allow for the ability to determine the success of a project, help project managers evaluate a project's status, foresee risks and assess team productivity and quality of work. As a tool, metrics can provide several good reasons for implementation. Each project is going to have different objectives, and what works for one project, may not for another, so remember to tailor your metrics and reporting to your unique needs.

[slide 10]

Useful Metrics for Project Management

Different project management metrics can be defined based on a project's objective and complexity; however, the following five can typically cover the most important measurements:

1. **Productivity** – this metric allows project managers to assess the utilization of resources. It compares the total effort to the budgeted effort, which has a direct impact on the bottom line. Delays in the timeline, underperformance by staff or vendor and unavoidable circumstances can all affect the productivity metric.
2. **Scope of Work** – A project's scope is typically established up front, but changes and additions can derail even the best project manager's efforts. Tracking change requests is necessary, to control them and keep the project on time and on budget.
3. **Quality and Satisfaction** – Quality assurance is truly a patron-focused metric. Assuring low defects throughout the project, as well as a quality deliverable at its end, should be part of every project. Catching defects early can also help prevent the entire project from losing focus and failing.
4. **Cost** – Measuring how costs are managed is often critical to a project's success. Cost management is related to other variables, such as quality, scope and productivity; if it varies above or below projections, the project can suffer. Ideally, cost is closely monitored throughout the project so if costs rise unexpectedly, variables such as scope or time are adjusted accordingly and the project can still achieve its objectives.
5. **Gross Margin** – Typically, in the business world, a project's ultimate goal is to contribute to the organization by increasing profits; however, in the GLAM world, this could mean something very different than financial profit. The gross margin is the difference between total income achieved and total costs spent on the project, and a target gross margin should be established in the planning stages and measured throughout.

[slide 11]

*Activity #2 (3-5 mins): What are some ways your project will help contribute to your organization's increased profits? To get you started, here is an example: When working on a digitization project, we did a significant amount of outreach, and a number of private families came forward to share their family papers to include; as a result, one of those families, at the end of the project, donated their papers to our archives, thus increasing our profits.

[Ellen moves to Discussion 2. Joy sets timer for 5 min. and gives verbal time notices as necessary. Ellen responds to answers and then moves back to the classroom.]

[slide 12]

Implementing Project Metrics

Once your metrics have been clearly defined to suit your organization's needs, it is time to begin implementing them. First, communicate with users to help them understand the process of the project. Focus on the importance of metrics, and how they can help improve your project. Create a metrics plan with guidelines that everyone can understand which may help your project gain support. Then, start implementing the plan. Remember that the metrics should lead to action; otherwise, they may not be useful. Update the plan as you identify unusable metrics.

[slide 13]

Metrics for Long-term Value

Tracking the five-project management metrics that were mentioned previously - productivity, scope of work, quality and satisfaction, cost, and gross margin - can help give project managers better control over the project and better odds for success. Over time, organizations can gain insights as to which methods are successful and which need tuning. Doing this can allow for improvements to later projects. Finally, implementing project management metrics can build historical data to help improve future planning.

[slide 14]

V. Sharing methods for tracking metrics, progress, and time (10 mins)

How you choose to track metrics, progress, and time for your projects is important not only to the project itself, but in sharing that information to your stakeholders. Typically, I use excel spreadsheets for tracking projects, since I already have it as part of Microsoft Office Suite. Here is an example of a spreadsheet I created for a previous project. You can see across the top where we indicated the institution, name of the collection, items, number of files, when the items were digitized, transcribed, metadata created, transcriptions and metadata checked, how many items were uploaded, and who was assigned those tasks. A sample template of this spreadsheet is available in the download file box. Since every project is different, how your spreadsheet is arranged will depend upon your specific needs. There are other tools available, including templates available for download, and software programs. What you choose to use is really going to depend on your institution's needs and budget.

We will now look at a few examples of methods used for tracking metrics, progress, and time.

[slide 15]

Gantt Charts

Gantt charts are a visual tool used by project managers that provide a good standard format for displaying project schedules and the information contained within them by listing the project activities and their corresponding start and finish dates.

[slide 16]

Simple Gantt Chart View

Here is a simple Gantt chart created for a project that I am currently working on. All of the activities are listed on the left with the schedules of all those tasks to the right. There are different symbols that can be used on Gantt charts: black diamonds to signify milestones, summary tasks signified by wide bars, lighter, horizontal bars, arrows that show dependencies between the tasks, making them at times, quite complex. I prefer simplicity. A Gantt chart is great to use for reporting or presenting on your project.

[slide 17]

PERT Charts

PERT (Program Evaluation and Review Technique) is a project management tool used to schedule, organize, and coordinate tasks within a project. It was developed in the late 1950s for the United States Navy for its pilot project developing Ballistic Missiles. PERT helps us identify critical tasks and activities and look at the probability of completing the project by a given date.

[slide 18]

This is an example of a PERT chart based on the same project you just saw illustrated in the Gantt chart. A little more complicated than the Gantt chart, the PERT chart shows us which tasks are necessary to complete prior to moving forward to the next. Start and end dates are indicated, as well as the duration of each phase of the project. The arrows are used to show where to proceed next. If we look at the two tasks that are starting simultaneously on day 31, “Digitize” and “House negatives”, we can see that their end dates differ. Since task 5 does not start until day 121, we need to wait until task 4 is completed before moving forward.

[slide 19]

CPM Chart

CPM (Critical Path Method) was developed in 1957 as a network model for project management. CPM is a deterministic method that uses a fixed time estimate for each activity. While easy to understand and use, CPM does not consider the time variations that can have a great impact on the completion time of a complex project. CPM helps us analyze the cost/time tradeoffs possible if we need to speed the project up.

[slide 20]

This is an example of a CPM chart. The CPM chart involves algorithms that determine the sequential path events in a project take place, indicated by the arrows. For example, “Event 4” is preceded by “Event 1”; “Event 5” is preceded by “Event 2”, but cannot start until “Event 1” is completed.

Tutorials for the Gantt, PERT, and CPM charts are available in the Resource Library for this series of webinars.

[slide 21]

Questions Which May Be Addressed by PERT & CPM

- Is the project on schedule, ahead of schedule, or behind schedule?
- Is the project over or under cost budget?
- Are there enough resources available to finish the project on time?
- If the project must be finished in less than the scheduled amount of time, what is the way to accomplish this at the least amount of cost?

[slide 22]

The Six Steps Common to PERT & CPM

1. Define the project and prepare the work breakdown structure
2. Develop relationships among the activities (decide which activities must precede and which must follow others)
3. Draw the network connecting all of the activities
4. Assign the time and/or cost estimates to each activity
5. Compute the longest time path through the network. This is called the *critical path*
6. Use the network to help plan, schedule, monitor, and control the project

[slide 23]

VI. Adapting to project roadblocks and unanticipated changes to the project (10 mins)

Expect change. We cannot predict every single moment of our lives, so it is important to remember this in terms of project management, and make every effort not to let the bumps in the road send you and your project team into a frenzy. While every effort should be made in the early stages of project planning for contingency plans, sometimes, things in life just happen. Change can be costly, in terms of money, time, headache, stress, heartache, and a number of other ways. Not everyone adjusts to change well, so having contingency plans stated up front could very easily save time and hopefully, some stress.

Remember that barbeque you were planning in the first webinar? What if an unexpected storm happened to develop just as your guests were arriving? Did you have a contingency plan in case of inclement weather? If not, can you quickly switch gears and come up with one? Chances are, your guests will adjust and everyone will have a great time regardless of the weather and where they eat. The question is, are you capable of handling unexpected change?

[slide 24]

A project manager's role is to manage the impact of change on a project, and requires having a strong structure whereby you can manage the flux that happens within projects. Almost all projects will require the completion of tasks that appear not to have been planned for and that will force a correction to the established plan.

There are two ways to deal with those tasks:

1. Ad hoc process – anyone can force any decision without going through a structured review process. This might work well for some teams, the preferred response is to use:
2. Structured and clear review process – funnels all requests through knowledgeable and responsible parties who understand the project, its impact on the organization, and the potential ramifications of the change being proposed. This process can alleviate stress within the organization, and certainly within the team.

[slide 25]

Change can also lead to conflict.

1. Ideological conflict – happens when there are differing opinions, and debate ensues in an honest effort to reach the truth, or hopefully, to agree on a plan of action. This can be productive, and allows for team members to actively participate in the process.
2. Nonproductive conflict – this can include different motives, be it political, pride, opportunism, the need to vent, annoyance, all of which carry the common theme of being unproductive.

In either case, a resolution will need to be reached. Hopefully, you will never have to experience conflict with your project, but if so, let's hope for a quick resolution! If you had contingency plans in place from the get-go, you may be able to avoid conflicts altogether!

[slide 26]

Change is a fact of life in any organization or project. The key for project managers is to learn to recognize that unexpected circumstances are going to arise and learn to cope with these changes as effectively as possible. How a project leader guides a team through times of change is not only a true measure of his or her leadership skills, but it determines the outcome of the project and the mood of the project team.

*Example of changes that can happen on a project: On a previous project at another institution, there were a few unanticipated changes to the project, that we all had to adjust to; I had a family emergency that required me to fly home on more than one occasion; my boss (and grant manager) left to take another position about two months before the project was ending; we had computer issues, and changing our CONTENTdm subscription a month before the project ended, which resulted in the entire project being moved from the Library's server to OCLC's server. We

all managed to adjust by communicating effectively and tried not getting too stressed about the changes.

[slide 27]

*Example of unexpected projects: Some projects can come up unexpectedly. Currently, I am working on one, but there is no way to anticipate the unexpected. Perhaps some of you have dealt with emergencies or pressing preservation issues with your collections. Recently, our institution's Photographic Services department transferred all of their negatives to the University Archives. Some of the negatives from the university's yearbook are in varying stages of vinegar syndrome. This has become a priority project in terms of rehousing and digitizing the negatives in order to preserve the images. Other projects I had either been working on or wanted to start working on, have taken a back seat at the moment, until I can complete this project.

[slide 28]

*Activity #3: What, if any, roadblocks have you encountered when working on projects? How did you deal with them? How do you deal with change?

[Ellen moves to Discussion 3. Joy sets timer for 3-5 min. and gives verbal time notices as necessary. Ellen responds to answers and then moves back to the classroom.]

[slide 29]

VII. Defining and celebrating project success with staff, management, and the community (10 mins)

[slide 30]

If you are assessing your project while in progress, there will be success at the end, which is what we all want, right?

How do we measure the success of a project? Success depends on...

- Realistic and definite goals (a good project definition)
- Client satisfaction (colleagues, boss, customer, patron, etc.)
- Profitability
- Market or service availability
- Implementation process
- Perceived value of project
- Communication
- Teamwork

[slide 31]

It is important to remain transparent throughout the project; let your stakeholders know what is going on, where you are in the progress and celebrate those milestones! Milestone celebrations could be as simple as a press release to let your stakeholders know where you are in terms of your project, how the budget is being spent, if your project is on target, and the next steps. Once your project is completed, a celebration on a larger scale may be in order!

* Activity #4: Does anyone else have ideas about celebrating project success? How would you celebrate?

[Ellen moves to Discussion 4. Joy sets timer for 3-5 min. and gives verbal time notices as necessary. Ellen responds to answers and then moves back to the classroom.]

[slide 32]

Ways to celebrate the end of your project:

- Thank you notes – after completing a highly collaborative digitization project, we sent thank you notes to all our participants and included a disc (in some cases, several discs) of copies of the scanned materials loaned from their respective collections
- Reception – this could be specifically for the project team, stakeholders, the general public, or a combination thereof
- Outing – take the project team out for a nice lunch or dinner
- Flowers – who doesn't like receiving flowers?
- Awards ceremony – created awards for project team members (these can be silly, but fun)
- Press release
- Lecture – this could be combined with a reception

Newsletter article

Alumni

Membership (if your organization has a membership or friends group)

Social media

- Exhibit – if your project involved processing a hidden collection, why not take the opportunity to showcase the collection?
- Time off – this might be much needed by all once a project is completed

[slide 33]

VIII. Setting new goals built on previous projects (10 mins)

Once you have completed your project, and of course celebrated its end, it is now time to take stock in what you learned along the way, and use those experiences to set new goals for your next project. If we think back again to the barbeque scenario, after all the guests have left, if you are anything like me, you will start thinking about “next time”. What worked, what didn't, what foods went over well, and those barely anyone touched. This is the time to ask yourself/selves, “if I had to do it all over again, what would I do differently?” Then, start making a list. Use your

experiences to build on for the next barbeque, the next project. Build on your knowledge and that of others on your team. Take stock in what you learned.

You can discover lessons by asking three questions:

1. What went right?
2. What went wrong?
3. What could have been better?

If you are working as part of a project team, it may be beneficial to work on this together – people tend to remember things differently, so it is a good idea to have everyone’s input. Be sure to write out your answers – hopefully you will refer back to these if you ever take on a similar project.

This is the time for the project manager to listen to recommendations from the project team. Feedback should be encouraged and constructive; if members of the team are uncomfortable with speaking up, offer an alternative solution, such as submitting their recommendations in writing and submitting them anonymously.

Document and share your findings. This should be done internally, so that there is a record on hand for future projects, but why not write an article about your experiences to share with others? What about presenting at a conference? There are any number of ways to share your “lessons learned”.

Why take stock in what we have learned? The obvious answer: so we do not repeat the same mistakes again and again and again.

[slide 34]

Common mistakes

- Too busy to evaluate projects once they are finished – we are all busy, and sometimes the next project comes right on the heels of the one we have just completed. Many of us sometimes forget to take the time to assess our projects before moving on to the next. Taking the time to reflect may actually save you some time in not repeating the same mistakes, give you less headaches and stress, and will probably make your life much more enjoyable!
- Moving on to the next project before taking the time to review the one you have just finished
- Failure to learn the lessons of past projects
- Not making those lessons learned available to other members of the organization

Part of taking stock in your completed project should include aspects of everything we’ve covered throughout this webinar series – from planning your project to building resources and relationships (who would you work with again, or hire again, or not?), to determining your

staffing needs, to the project itself to overcoming project hurdles, and finally, to assessing your project.

We hope that you have gained some insight into managing projects for your hidden collections, and can't wait to hear about them!

[slide 35]

IX. Questions/Evaluation

Joy:

Thank you Ellen and everyone for a great session. Please be sure to complete the webinar evaluation you will receive while the content is fresh in your mind. This final evaluation will also ask you a few questions about the series overall. We hope you have enjoyed all of our sessions, and we want to thank everyone involved for their commitment to making this a valuable educational tool for the GLAM community. Please share information about the recordings with your professional network so that others can benefit from this series. Have a great day!