BEST PRACTICES FOR PROJECT MANAGEMENT AND COLLABORATION

Digital Scholarship @ UF Workshops

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http://ufdc.ufl.edu/I/IR00010204
WHAT IS A PROJECT?

• Temporary endeavor
  • definite start and end date
• Produces unique result
• Complete when all objectives are met
• Meets expectations of stakeholders

Examples

<p>| |</p>
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Digitizing a collection</td>
</tr>
<tr>
<td>Moving a library</td>
</tr>
<tr>
<td>Research paper/thesis/dissertation</td>
</tr>
<tr>
<td>Building a house</td>
</tr>
</tbody>
</table>
WHAT IS PROJECT MANAGEMENT?

- Actively applying knowledge, skills, tools, and techniques to meet project objective

INITIATING

1. Define scope
2. Obtain financial commitment
3. Identify stakeholders
4. Select project manager
Elements:
• Project name
• Objective
• Scope
• Deliverables
• Stakeholders
  • Customers
  • Team structure/roles
• Implementation
  • Plan
  • Milestones
  • Resource plan
• Risks
  • Cost
  • Time
  • Resources

As defined by Wikipedia:

In project management, a project charter, project definition, or project statement is a statement of the scope, objectives, and participants in a project. It provides a preliminary delineation of roles and responsibilities, outlines the project objectives, identifies the main stakeholders, and defines the authority of the project manager.

(https://en.wikipedia.org/wiki/Project_charter)
<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Role</th>
<th>Contact Info</th>
<th>Interest</th>
<th>Influence</th>
<th>Expectations</th>
<th>Comm. Reqs.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ms. G.</td>
<td>NEH NDNP Project Coordinator</td>
<td>Sponsor</td>
<td>Neh.gov</td>
<td>High</td>
<td>High</td>
<td>Project completed on time</td>
<td>email</td>
</tr>
</tbody>
</table>
PLANNING

Create project documents

Create project management plan

- Scope
- Schedule
- Costs
- Quality
- HR
- Communications
- Risks
- Procurements
- Stakeholders
SCHEDULING

• Sequencing
  • Activity list
• Logic Diagrams
• Critical Path
• Presentation/Visualization
  • Action plans
  • Gantt charts
  • Calendar
• Monitoring progress
CRITICAL PATH

Activity A: Select titles
Activity B: Duplicate film
Activity C: Collate film
Activity D: Order hard drives
Activity E: Digitize film
Activity F: Review digitized content
Activity G: Send to Library of Congress
Activity H: Ingest

<table>
<thead>
<tr>
<th>Activity</th>
<th>Predecessor</th>
<th>Duration (days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>n/a</td>
<td>5</td>
</tr>
<tr>
<td>B</td>
<td>A</td>
<td>10</td>
</tr>
<tr>
<td>C</td>
<td>B</td>
<td>15</td>
</tr>
<tr>
<td>D</td>
<td>n/a</td>
<td>2</td>
</tr>
<tr>
<td>E</td>
<td>C, D</td>
<td>20</td>
</tr>
<tr>
<td>F</td>
<td>E</td>
<td>10</td>
</tr>
<tr>
<td>G</td>
<td>F</td>
<td>2</td>
</tr>
<tr>
<td>H</td>
<td>G</td>
<td>10</td>
</tr>
</tbody>
</table>
CRITICAL PATH
A + B + C + E + F + G + H = 72
D + E + F + G + H = 44

ABCEFGH = Critical Path
## Scheduling

<table>
<thead>
<tr>
<th>Fall 2015</th>
<th>Winter 2015/2016</th>
<th>Spring 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept(1)</td>
<td>Oct(2)</td>
<td>Nov(3)</td>
</tr>
<tr>
<td>Attend annual awards meeting in LC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provide LS list of selected titles for LIR, to include LS, geographic and chronological coverage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deliver sample digital access to LC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Duplicate selected newspapers from master negatives hosted at UMF</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create catalog 6 metadata spreadsheets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deliver to UP first shipment of duplicated microform rolls (approx. 62 rolls)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create ONL digital negative from master</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create catalog 6 metadata spreadsheets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Perform additional technical analysis on selected titles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create deliverable TIFFs, deliverables image metadata, O HotSpot, part LC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Upload technical/browsing PDFs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deliver edited deliverables to UP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verify deliverables from vendor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deliver to UP second shipment of duplicated microform rolls (approx. 62 rolls)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Locate all on duplicate other negatives MPEG with barcode from LC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Write 500 word essays for selected titles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provide UP with 500 word essays for selected titles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report #1 due to NED &amp; LC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deliver spreadsheets to LC on monthly basis</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report #2 due to NED &amp; LC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All outreach due to LCIR</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[http://ufdc.ufl.edu/IR00007369/00001/](http://ufdc.ufl.edu/IR00007369/00001/)
COST MANAGEMENT

1. Estimate costs
2. Determine budget
3. Control costs
HUMAN RESOURCE MANAGEMENT

- Acquire team
- Assign roles
- Assign activities
- Train team

The Team:
- Ways to collaborate
- Team building
- Effective team working:
  - communication
  - motivation
  - feedback

### COMMUNICATION MANAGEMENT

<table>
<thead>
<tr>
<th>Important skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listening</td>
</tr>
<tr>
<td>Questioning</td>
</tr>
<tr>
<td>Fact-finding</td>
</tr>
<tr>
<td>Educating</td>
</tr>
<tr>
<td>Motivating</td>
</tr>
<tr>
<td>Coaching</td>
</tr>
<tr>
<td>Negotiating</td>
</tr>
<tr>
<td>Resolving conflict</td>
</tr>
<tr>
<td>Effective decision making</td>
</tr>
<tr>
<td>Dimensions</td>
</tr>
<tr>
<td>Internal/External</td>
</tr>
<tr>
<td>Formal/Informal</td>
</tr>
<tr>
<td>Official/Unofficial</td>
</tr>
<tr>
<td>Written and oral/ nonverbal</td>
</tr>
<tr>
<td>Planning</td>
</tr>
<tr>
<td>Managing</td>
</tr>
</tbody>
</table>
PROJECT PARTNERSHIPS

• Benefits
  • Resources
  • Quality
  • innovation
• Building partnerships
  • Open, honest, trusting
  • Agreements
  • Roles and tasks
• Challenges
  • Unequal work
  • Dominance
  • Communication
QUALITY MANAGEMENT

1. Define quality
2. Plan quality
3. Control quality
Elements of risk management

• Risk identification
• Risk analysis
• Risk response planning
• Risk monitoring and control
EXECUTING

- Perform tasks
- Identify problems, execute mitigations
- Communicate
- Inspect quality
- Review project process
Monitor progress
Manage changes
Verify quality of deliverables
Control schedule
Control budget
Monitor communication
Monitor and control risks
EVALUATION & REVIEW

- Collect info
- Analyze info
- Disseminate info
  - Reports
  - Community events
  - Conference presentations/papers
  - Website/IR
CLOSING

- Confirm all activities/tasks completed
- Collect records (lessons learned)
- Transfer ownership
**TOOLS**

- **BaseCamp**  
  [https://basecamp.com/](https://basecamp.com/)

- **Collabtive**  
  [https://www.collabtive.com/](https://www.collabtive.com/)

- **MS Project**  

- **Project Hub**  

- **Trello**  
  [https://trello.com/](https://trello.com/)

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Example from Trello

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TOOLS

Scheduling

Calligra  https://www.calligra.org/plan/
GanttProject  http://www.ganttproject.biz/
MS Excel  https://products.office.com/en-us/excel
SmartSheet  https://www.smartsheet.com/

Example from SmartSheet
TOOLS

Time/Tasks

Google Calendar
https://www.google.com/calendar

MS Outlook
https://www.microsoft.com/en-xm/outlook-com/

Communication

WordPress
https://wordpress.com/

Slack
https://slack.com/

Skype for Business
Tools

Budgeting

MS Excel  https://products.office.com/en-us/excel

OpenOffice Calc  https://www.openoffice.org/product/calc.html
RESOURCES


Project Management Institute, https://www.pmi.org/

Lynda.com

PMTTraining.com

Center for Clinical and Translational Science, Ohio State University Project Management for Research Toolkit https://ccts.osu.edu/content/project-management-research?highlight=project%20management

Project Management Toolkit, UF Libraries
http://library.ufl.edu/pers/ProjectManagementTools.htm

Project Charters & Prenups for Scientist, UF Digital Humanities Library Group
http://ufdc.ufl.edu/AA00025527/00001

Project Charter Resources, UF Libraries
http://ufdc.ufl.edu/AA00017119/00015/pdf

ProjectEngineer.net

PMP Courses:
University of Miami

Ohio State University
https://osu.edu2.com/p-324-project-management-professional-pmp.aspx

Kent University
https://www.kent.edu/yourtrainingpartner/certificate-project-management


