Project Management

Moving Beyond MacGyver

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As work in libraries continues to become more project-driven, formal project-management training for librarians and other library staff is not necessarily keeping pace. While this scenario is far from ideal, workarounds can be effectively utilized if need be. In this column, Amy Stewart-Mailhiot offers guidance to librarians about how to rely on the proven tools of their trade to successfully manage projects. She suggests that employing such approaches, and applying some dependable rules of thumb—while not optimal—can help pave the way to accomplishing this critical work in the absence of exposure to more structured project-management training.—*Editor*

I n the Winter 2014 *RUSQ* Management column, Jane Currie reflected on the importance of followership and the prominent role it can play in librarianship, where a majority of professionals will not be active in formal organizational management.[1] As Currie's examples indicate, one area of management that many librarians do take part in is project management (PM), when they are tasked with leading a group of colleagues to address a need, improve an existing space or service, or implement something new. By their very nature, these projects are in addition to the librarian's day-to-day responsibilities, and therefore require careful planning to ensure success and decrease stress.

In her column, Currie highlighted the key components of effective followership, many that mirror the fundamentals of good project management: creating and sticking to deadlines, the importance of communication, the need for assessment, and an understanding of the value of relationships within an organization and how those relationships can develop into stakeholder support for a given project.[2] It is interesting that the topics of both followership and project management are underrepresented in the library literature, despite the prevalence of each within the profession. A quick scan of any article on PM in libraries indicates one of the two things (and usually both) mentioned: the lack of literature on the topic and the lack of training in PM among librarians. As Burich, et al note, "When project management techniques are used in American libraries, most often they are used informally, often without managers being conscious of their use."[3]

The extent of the disconnect between libraries and librarians completing projects and formal PM training among library staff was at the core of Howarth's 2011 study of librarians in Ontario. Ninety-two percent of survey respondents indicated that they had been part of at least one project team in the previous twelve months, with 31 percent indicating they had served as "project lead." However, when asked

about the PM training they had received, 23 percent answered that they had "no training," with the greatest number of responses reported for "read book(s)" and "read article(s)."[4] Winston and Hoffman trace the lack of formal training back even further, finding that less fewer 4 percent of accredited LIS programs in the US and Canada include PM in the curriculum.[5] It is not surprising, therefore, that more than 40 percent of those in Howarth's study described the PM processes in place in their library as "Ad-Hoc," with "no formal approach to managing projects."[6]

As an instruction librarian with no management responsibilities, I am firmly rooted in the followership camp that Currie described. I am also one of the many librarians with no formal project management training. So when, in the fall of 2011, I was tasked with creating a mandatory academic integrity (AI) module for all incoming students, I did what any good member of my generation would do—I "MacGyver-ed" it. For those of you young enough to have missed the 1980s television action-adventure series, or the myriad culture references in the intervening years, to MacGyver generally refers to employing creative thinking and the tools at hand to solve a problem. For my challenge of developing the orientation module, I would not rely on duct tape and paper clips, but on the tools that had served me well in developing information literacy sessions—a basic understanding of instructional design and strong people skills.

PROJECT BACKGROUND

As Lori Wamsley describes in her article "Controlling Project Chaos: Project Management for Library Staff," the motivators for a project may be "market-driven, crisis-driven, or change driven."[7] The project described in this paper was primarily driven by combination of crisis and change—the crisis being the increase in academic dishonesty reports and the change being the desire on the part of Student Life staff to develop a more academically robust orientation program.

A liberal arts school with an enrollment of roughly 3,500 students, Pacific Lutheran University (PLU) is not immune to the issues of academic dishonesty and plagiarism. In my work as an instruction librarian, I was actively engaged in teaching both first-year and international students, which resulted in establishing relationships with both the Director of International Students in the Office of Student Life and the Director of the First Year Experience Program. Through these relationships, I became aware of the upward trend in academic dishonesty reports on campus among both international and domestic students. From members of the First Year Experience Program (FYEP) leadership, I also learned of previous attempts to integrate an AI module into FYEP courses through individual classroom visits from Writing Center staff. For a program that averages thirty-three course sections each fall, the scheduling and staffing of this approach was not feasible. In an effort to bridge the gap between the student life and the academic sides of campus, I

called a meeting of stakeholders from both units and within an hour it was agreed that Student Life would require the academic integrity module as part of new student orientation for the coming fall. I was given primary responsibility for making this requirement a reality.

THE MISSION

Viewing the project through the lens I knew best, teaching and learning, I set out to turn this large project into "just another information literacy session" and started where I always start—with the end in mind. From a backward design perspective, the first step in the project was to determine the learning outcomes we wanted the students to achieve as a result of the session. Using another trusted librarian tool, I started by conducting focus groups of current students, asking them to respond to the prompt, "what do I wish I had known when I started college" as it related to issues of academic integrity, citing sources, and plagiarism. Students were recruited by reaching out to campus partners, including the women's center, diversity center, athletics, and the theatre program. The information gathered from the focus groups was then mapped to key concepts taken from the literature, as well as results from a campus survey on academic integrity that was conducted the previous year. This formed the basis of the information we would attempt to cover in the module.

With the learning and project outcomes in hand, the project turned to determining and designing the most appropriate mode of delivery to facilitate student learning. As a primarily residential institution, with a strong face-to-face tradition, it was decided that the session needed to take place in person. This meant that we would have one hour to deliver the module to more than six hundred students. Keeping in mind the student feedback on the need for an interactive session, the project team (consisting of me and the campus videographer) began brainstorming ways to deliver the content via video and integrate some level of audience response.

Working closely with the directors of the Writing Center, Student Conduct Office, and New Student Orientation, we developed a storyboard for the video that incorporated a variety of student and faculty members introducing various components of the content. We used Poll Everywhere to gather information in a series of pre- and post-video questions that was employed as our assessment of student learning. On the final day of orientation, I stood before a gym full of new students and brought the nearly year-long project to a close.

LESSONS LEARNED

The somewhat unstructured and makeshift approach to the project nonetheless resulted in a considerable number of valuable lessons learned that are worth sharing:

1. Be creative in your thinking. Ask the questions you feel need to be asked, and don't assume that the answer will no—and when the answer is no, look for alternatives. As this project demonstrated, getting all first year faculty to agree to devote class time to the AI module would have been very difficult. Removing that obstacle from the table provided an entry for the Student Life Office to step in and make it a mandatory part of orientation.

2. Be realistic in planning the amount of time the project will take, and make use of mini-deadlines or mileposts along the way. A simple Excel spreadsheet or even a chart on a white board can provide a framework for accountability, but if you set unrealistic expectations, you run the risk of derailing some aspect of your project. If the deadline is set from outside the library, as was the case with the timing of orientation, be sure to add in a buffer period before the actual deadline to allow for confirmation that all elements are complete and working properly.

3. Communicate with stakeholders early and often. Establishing buy-in from directors of key departments on campus was critical to the success of the project. Regular check-ins not only kept the project on their radar, but also provided a team of individuals to offer feedback on the project at various points in the process.

4. Plan time to reflect and assess. Assessment is an increasingly central activity in libraries, but it can be challenging, particularly in a small shop, to set aside time to intentionally reflect on the work that was done. It is important to incorporate this step into your timeline on the front end, so as not to overlook it as you move on to the next project in your queue.

REFLECTING BACK

It was not until the project was successfully completed that I reflected on the structure of my MacGyver-ing approach and discovered that it contained many the project management tools and processes detailed in the literature (e.g., Atkins, Burich et al., Horwarth). For example, I started with a clearly defined project outcome and then created a timeline with milestones that took into account the deadline and various constraints of the academic calendar. Additionally, stakeholders were engaged early in the process, and team members were selected based on the fit between their skills and the needs of the project. Yet despite the success and the important lessons learned, I can't help but wonder if I could have been more efficient and effective had I been armed with more formal PM training rather than just a crafty MacGyver mentality.

The literature on the topic appears to provide an answer to my question—PM training can make a positive difference. Establishing an organizational culture that incorporates project management and moving away from the ad-hoc model Howarth described can be of value for libraries of all types and sizes. I encourage those in a followership position to seek out training opportunities through your institution, at state conferences, or by attending one of LLAMA's Career Institutes on the topic. For those in leadership roles, I suggest that you explore ways to support your staff in developing and refining these skills. After all, while it can be exhilarating to pull off a project in MacGyver fashion, developing and deploying a fluency in project management has the potential for more sustainable success.

References

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