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Project Management Office to the Rescue: Aligning Workforce and Resources with Library Vision and Delivering Results

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Abstract

Many libraries today are inundated with increasing number of tasks, projects, and initiatives through which they hope to achieve their mission and strategic vision only to find themselves losing focus and drowning in the volume of work. Hesburgh Libraries at the University of Notre Dame struggled with absorbing an exponentially growing number of projects and aligning them with institutional strategic initiatives and goals. The increasing number of projects and the relatively stable size of the workforce significantly impacted the institution's ability to complete projects in a timely fashion and within the budgetary allocation.

In October 2015, the Project Management Office (PMO) was formed. Four dedicated employees were reassigned from their previous responsibilities to manage PMO portfolios and help the libraries lead and complete projects, as well as assist with prioritization of continuously incoming project requests. PMO's objectives include coordination of projects in the areas of information technology (IT), technical services, and fostering of selected library strategic initiatives. Since PMO's formation, the libraries have seen a meaningful transformation in the stewardship of resources and an increase in accountability for delivering results.

This paper describes the idea behind PMO formation; our internal process for vetting and prioritizing project requests; the approaches and tools we use to organize, manage, and document approved projects; and our goals for the future as PMO continues to mature and develop.

Project Management (PM) is a concept both foreign and familiar to the library profession. As more information technology is intertwined with library science, the PM practices have permeated through library organizations, perhaps more so in the digital technology areas but not as much in traditional departments. Nevertheless, PM has been recognized as a core competency (Schachter, 2004; Horwath, J., 2012) in demand (Kinkus, 2007) and as one of the emerging sets of expertise, skills, or new competencies by our profession (Feeney & Sult, 2011; Jaguszewski & Williams, 2013). Library administrators understand the result-orientation of PM. As library stakeholders demand more value from the investments in the

libraries, PM offers a set of practices that bring results to the organization and, therefore, to library patrons and stakeholders. Library professionals have been applying PM principles in their work, grappling with what PM brings to their patrons on a daily basis. Judging by the results, PM seems to have made a dent on the demonstration of its effectiveness. At the same time, librarians get frustrated as internal clients of Technical Services or IT departments, while end users are stressed by interacting with Public Services departments. Aforementioned is an anecdotal statement based on authors' observations of their current organization and peer institutions. The phenomenon brings an interesting point, which is as libraries and library associations have been investing in programs and workshops, seminars, and webinars to polish librarians' PM skills, why, then, does the impact of our investment varies among institutions? The authors believe that library profession has arrived at an unusual time where the adoption of PM is declining in its effectiveness, while at the same time libraries are faced with a diminishing return on their investment of PM skills in library professionals.

Is PM a culprit for not being an effective tool for delivering results? If the answer is yes, then libraries should stop project managing. Instead, they should start finding other remedies to demonstrate impacts and values to their stakeholders. Authors do not believe that PM loses its utility to affect bottom lines of the libraries. The set of PM skills is critical to library success even more so under current climate; however, the problem exhibits itself in how PM is represented in the current position model.

Wearing Many Hats

What is the last bullet point in most job descriptions? Everyone working in the libraries for quite some time and those new to the profession will know the answer: “Duties as assigned.” However, not everyone will understand its meaning until he/she works in the field for some time. Professionals are proud of taking on new assignments. It is an honor to be asked to take on new roles and responsibilities. It is then viewed as part of implicit leadership or management training, and it is one of the ways to learn more about one’s institution and colleagues. With that said, this last bullet point of a job description has several drawbacks, as well. Authors’ observation is that libraries are lavishly taxing on this bullet point, rather than approaching it with some reservation. There is a reason why people are holding certain positions defined by primary assignments, whether it is cataloging, acquisitions, collection development, or any supervision and management roles, those that are critical for any library to fulfill its mission. If

other assigned duties impede employees’ time and efforts to complete their primary assignments, libraries get themselves into a vicious cycle of not allowing their employees to perform well both in their primary and other duties. For example, software engineers are hired to code and develop applications, but over time they start taking on roles as project managers and product owners of the applications they develop. In such cases, programmers self-setting their software priorities and quality assurance could become subjective, which affects project neutrality in a negative way. Additionally, by playing roles of project managers and product owners, they spend too much time away from coding, the job that they are good at and were hired to do. As a project manager, one has to communicate, negotiate, prioritize, scope, execute, and close projects; as a product owner, one needs to monitor emerging features, understand user demands and develop and prioritize requirements. Programmers’ jobs because of the “duties as assigned” clause on their position description could turn out to be depicted as in Diagram One:

Figure 1. Inverted position description.

Figure 2. Original position description.

Diagram One offers one explanation why clients of IT departments are often dissatisfied as projects tend to progress at a very slow pace. Much of their time is spent on project management and product ownership rather than systems or programming work. Also, let's face it: Project management and product ownership require strong communication skills, which is often not a forte of the majority of programmers. There are reasons and motivations why certain demographics are drawn to specific types of work. Aforementioned is not intended to demean programmers. It is not to say that programmers cannot be excellent communicators. Authors worked with many amazing developers with exceptional communication skills, but the question is whether they should be taking on communication as their primary assignment, even if they are excellent at it. The same is true of any technical work, such as cataloging, acquisitions, and systems. More critically, the upside-down model is valid for all the roles of library professionals, whether technical or nontechnical, whether front-line or supervisory positions. Such a model has tremendous negative impacts on the bottom lines of the libraries, as the primary assignments of positions shrink to a lesser percentage of the positions' portfolios. This inverted pyramid may help library professionals and leaders understand one of the possible root issues causing the diminishing values of PM, so it is imperative to restore the original intent of any position in libraries, as shown in Diagram Two, which is to set the appropriate ratio between the primary

assignments and "duties as assigned." Those add-on responsibilities have to be opportunistic and one-offs. PM, which requires ongoing commitments and efforts, unfortunately, is not a good option for add-on duties.

Tipping Point and Momentum

Diagram Two offers a blueprint for reconstructing PM at the Hesburgh Libraries. In January 2014, the libraries hired their first full-time digital project manager. Some people were skeptical about the effectiveness of the position, since much of the project management work was integrated with everyone's job portfolio. There was doubt about the decision, as some believed that the institution needed to acquire more programming resources since programming projects were often stalled. At the time of hire, the libraries had been coding the institutional digital repository for a while and had been planning a major building renovation project, as a result of which the libraries needed to move approximately 1 million volumes to an off-site facility and custom build an inventory management system (IMS). The project manager was tasked with overseeing both projects among many others. People saw the change the new position demonstrated: Repository project was on track regarding deliverables and timeliness, and the libraries finished the book move in nine months, including completion of a functional IMS to support

the ingest of materials. The benefits of having a full-time project manager on staff became obvious. More importantly, folks who had to be tasked with PM, such as programmers, unit heads, supervisors, and department heads, began to taste the benefits first-hand: The position allowed them to return to their primary responsibilities. Developers could code more; managers could focus on managing their teams. People started sensing a different way that could help them be productive and fruitful without continuing the current job portfolio model. We had managers requesting more project managers in the next round of position requests in summer 2014 instead of asking for more programmers. The recruitment of the first project manager became a tipping point for the division go through a functional/expertise review, in which PM was clearly identified as a major know-how among other six functions (collection services, collection description, programming, customer services, infrastructure, and technical systems and processes).

Forming Virtual PM Office (PMO)

In summer 2015, the libraries initiated a third round of organizational review, tweaking its structure set during the initial reorganization in 2012. Staff and faculty filled out a talent survey in order to help them align their skills and interests with the goals of the institution. At the strategic level, the libraries had trimmed the list of strategic initiatives from a lengthy set of 22 to a manageable set of eight. The libraries had created a change culture that fostered the triangulation of resources, strategic impacts, and skill development. This culture enabled a conversation with the organization to form a PMO based on the outcomes of the divisional function/expertise review. Two staff and one faculty expressed interest in becoming project managers. Hesburgh Libraries' PMO formed as a virtual office, which included a project manager from each divisional department.

At the same time, PMO was a new concept to the institution. Several rounds of conversations with the management and leadership groups took place to distinguish it among other existing matrix groups, such as official teams and committees. In contrast to the latter ones, the ownership of PMO is to:

- Be responsible for managing and coordinating project planning, execution and all related communications around project implementation;

- Provide a consistent and informed end-to-end client experience which the libraries hope will deliver more timely projects with greater satisfaction;
- Own and optimize PM processes and best practices;
- Develop consultation and coaching programs for all library employees.

Committees and teams own special tasks that require coordination and collaboration across departments. Committees and teams often apply PM processes to their work; however, they do not own the PM processes. Members on committees and teams rotate on and off; they are formed and disbanded from time to time. The knowledge of PM is difficult to be inherited and implemented consistently throughout the iterations of committees and teams, which could create gaps in improving productivity and efficiency. Since PMO owns the PM processes as a discipline, the office takes on the tasks to coach members of the libraries to learn about PM best practices. Once members learn PM processes and soft skills, they can share PM language and protocol to carry out their work if serving on a committee or a team. Collectively, a centralized PMO operation enables a formal documentation process, through which a collective body of PM knowledge is created, making the office responsible for continuity and carrying it through from project to project.

Virtual model is also a critical component of PMO success for any institution new to the PM discipline, since the existing hierarchy often perceives a physical PMO as a threat rather than an opportunity. A physical PMO adds more complexity of decision-making and may cause a power tug-of-war between project managers and unit managers. During the summer of 2015, the leaders of the division had conversations about roles and responsibilities of managers, supervisors, and project managers. A decision model that involves consultation and collaborative decision-making was introduced to the division. After a buy-in was achieved, the first PMO was formed in October 2015.

Technical Services Librarian in a Role of Project Manager

As PMO was being formed in the second half of 2015, it became obvious that having a professional

librarian in the mix would be highly desirable and beneficial, since PMO was going to be positioned in the libraries, and many nontechnology library projects would be tackled by the office. With that idea in mind, the original makeup of PMO was 2.5 full-time equivalent (FTE) staff and 1 FTE faculty. After reorganizing Technical Services and consolidating some of the functional areas in the department, a former unit manager with years of unofficial project management experience in cataloging and catalog maintenance was able to move into a new role of PM.

There were several conspicuous benefits to having a librarian on staff in the office. First, it was about promoting the concept of PM among faculty and to get library faculty buy-in to collaborate with PMO. Second, a librarian brought deep knowledge of issues innately critical to library profession to the office. Third, a librarian would play a role of PMO ambassador in a profession where PM approach still remains in its infancy stages, while at the same time would represent library faculty interests in PMO.

Prior to the official transition, a new faculty position description had to be created and approved by the provost. The libraries had to explain to the provost office the idea behind reassigning a faculty position to PMO, a concept that was nascent and lacked precedent. After a short period of negotiation and clarification, the provost signed off on the libraries' request and granted the approval.

Nuts-n-Bolts of a Virtual Project Management Office (PMO)

Because PMO at Hesburgh Libraries is a virtual office, with all members administratively reporting through different channels, PMO spent the first several months on forming the office and defining the guidelines for working together as a team. PMO drew a charter, the governing document for the team; discussed terminology and definitions, ensuring that everyone in the office had the same understanding; together with assistant university librarian (AUL), discussed priorities and defined responsibilities of PMO members. Additionally, the office outlined a plan for dividing projects that were waiting to be tackled and scheduled weekly meetings to provide updates and share information about projects, priorities, and challenges.

All staff project managers, although reporting to different supervisors, were already physically located in the same office space alongside libraries' technology department: Developers, computer support, and system administrators, while the librarian project manager remained with technical services department and was physically isolated. In the early stages of the PMO formation, it was decided that the librarian will have a desk next to other members of PMO and will split the work week between two locations. Such an arrangement proved to be critical not only to building camaraderie among PMO members but also to familiarizing the technical services librarian with technology and systems types projects that other project managers were mostly assigned to. Physically collocating everyone in the same area also demonstrated the cohesiveness of PMO and served as a visual evidence of the office's existence to everyone in the libraries.

Defining Roles and Responsibilities

Since PMO's inception, project managers have been working hard to earn trust of colleagues, demonstrate added value of their contributions to the libraries, and gradually begin changing the institutional culture. While moving steadily toward fulfilling those goals, the division became ready to further break down the responsibilities of PMO. In the beginning, project managers played multiple roles. They acted as project managers, product owners, and agile scrum masters. As PM has been slowly turning into an acceptable and even desirable way of organizing work in the division, more project requests started coming to PMO. Eventually, the project managers realized that they could not handle management of projects and prioritization of product features. It was time to sit down and begin conversations about better defining roles and responsibilities and separating project managers from product owners and scrum masters. Unit supervisors or team leads were assigned a role of leading morning scrums. Every product/service that was being developed had an owner assigned, and project managers heavily relied on those individuals to set priorities and make decisions on behalf of stakeholders/customers. Following the changes made, project managers could focus on managing timelines, scheduling, communication, coordination of efforts, and budgets.

The division of work made sense: Project managers play a neutral role and are accountable for

facilitating their projects and seeing them through completion; product owners, selected from internal and external user communities, are advocating on customers' behalf and remove pressure from project managers and individual contributors to set priorities; managers are accountable for making sure that their teams complete assigned work but are not responsible for managing projects or product priorities.

PMO continues to work on refining roles and advocating on behalf of the office for a collaborative environment where all the players know exactly what their responsibilities are. Although there is still much to do, PMO is definitely moving in the right direction.

Tools to Keep Track of Projects and Enduring Commitments

Even prior to forming PMO at Hesburgh Libraries, the AUL wanted to have access to a high-level overview of all the work that was happening in the division. To do that, a Google Sheet was created with multiple columns, and each department was asked to use it routinely to record project work. As with any spreadsheet, the document quickly became cumbersome, hard to navigate, and challenging to manage. The sole goal of making it easy for managers to record their departments' work and of having a way to get a quick overview of division-wide projects was derailed.

As a solution and to encourage everyone in the libraries to use the new system of funneling requests through a centralized location, as opposed to making arrangements about new projects during water cooler conversations, an online form was created that required only several critical pieces of information about new project requests. The link to the form has been continuously shared in weekly libraries' newsletter and was added to multiple locations on the Intranet. Once the form is submitted, requests drop into the same original Google Sheet, and a project manager reaches out to the requestor to gather more detailed information about the project.

To further improve the process of sharing information across the libraries about divisional projects and to provide a way for project managers, as well as unit managers and supervisors to keep

track of projects and to move them along from start to finish, PMO took JIRA¹, a commercially available software used by many developers and agile teams, and modified it so it could provide bird's-eye view of all the work that the division has committed to during each of the three academic semesters (fall, spring, and summer). JIRA allows users to view a current sprint, a backlog, and all the active projects with appropriate assignees responsible for the work. Everyone in the libraries is able to view the divisional dashboard and check on the status of any project; however, only authorized users are able to make changes and updates. Future plans include feeding information from the online form directly into JIRA.

Weekly, AUL and his direct reports discuss new project submissions and prioritize them based on institutional priority, availability of resources, capacity, and PMO availability. The system seems to work well and acts as a fairness mechanism where no request is given special treatment over another. All future projects are reviewed in order received and prioritized centrally using a predetermined rubric.

Since, for the most part, technical services work is not thought of as project work, at first it was difficult to think in terms of projects and translate routine types of assignments into something that could be recorded on the spreadsheet. It felt like trying to fit a square peg in a round hole. As a solution, a new category *enduring commitment* was created, which could be assigned to routine work primarily performed within one unit. Those enduring commitments are recorded in JIRA alongside projects, and unit supervisors have responsibility for moving them along to show the progress. Such an arrangement allows for a higher level of accountability and a greater level of transparency. It also helps with visually evaluating capacity in each department and unit of the division and highlights availability of resources for incoming projects.

Training and Professional Development

At the University of Notre Dame, and Hesburgh Libraries in particular, support for training and professional development is an essential component of realizing the mission and strategic agenda. There are several venues that PMO members have had access to that assist with increasing professional competence and further development of PM skills.

As soon as the office formed, project managers joined Project Management Institute (PMI),² an international organization for project managers. PMI offers a wealth of resources to its membership, some of which include complimentary access to the latest edition of *PMBOK Guide*, discounts on seminars and conference participation, educational materials, networking opportunities, and information about PM-related upcoming events around the world.

In addition, PMO members have ongoing opportunities to sign up for campus HR training classes to develop soft skills that are crucial to being successful at PM. University Office of Continuous Improvement is another resource that PMO has tapped into for tackling highly complex projects that call for improving an existing process to gain greater efficiency. Finally, office members have opportunities to attend select national-level library conferences and technology seminars.

On a quarterly basis, PMO holds retreats where facilitators and invited speakers are invited to present on various topics of interest to the office. Retreats are also used for team building to help PMO further jell as a team. All of these development activities require time away from managing projects, but they are absolutely critical to PMO's continuous growth as a very important new entity in organization.

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¹ JIRA: <https://www.atlassian.com/software/jira>

² Project Management Institute: <http://www.pmi.org/>

In Conclusion and Looking Ahead

Projects that PMO is responsible for can range from extremely complex to fairly light-load. Some examples include such strategic initiatives as building institutional repository, moving 1 million print volumes to an offsite facility, and library website redesign. Other project examples include managing renovation-related move of the whole Technical Services department to a new location, various vendor-led and in-house digitization projects, and coordination of software migration/implementation with university's IT department.

In the last year, PMO has developed into a fairly stable team already, yet it is clear that there is much work ahead as the office draws its attention to fine tuning existing processes and seeks to find a balance between feeling overwhelmed and underutilized. PMO continues to work on cross-training staff and librarian project managers so they feel comfortable stepping in and managing each other's work, if needed. As a future step, the office is also looking to focus its energies on devising a solid plan for division-wide portfolio management.

Finally, there is hope that PMO could be expanded as organizational resources become available so it could grow organically while working on culture shift at Hesburgh Libraries where PM becomes a language that librarians and developers have in common.