

Power to the people : project planning for everybody, everyday

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Constant change has become the norm in Libraries due to user expectations and needs, technological innovation, corporate rationalisation and quality accreditations. Libraries, and Library staff from all levels, are being asked to implement and manage a myriad of projects to enable this change. This is happening in a restrained economic climate which has brought reduced library budgets and diminishing staff numbers. Department managers and section heads are being asked to shoulder an increasing portfolio of responsibilities, and their staff are expected to multiskill in order to carry out required tasks to support the supervisors and managers.

In order to accomplish tasks, supervisors and managers are delegating more to their staff. Staff are then expected to perform tasks at a higher level, and work more independently. Typically supervisors or managers create project plans and act as project managers to direct and supervise staff involved in the project. This results in stressed supervisors and often staff feel disconnected from the process. Projects have an increased chance of successful completion if all staff feel a sense of ownership of the project. Supervisors can empower their staff by involving them in project planning. This equips staff with both the skills and confidence needed in order to be able to develop and implement project plans independently, and reduces the time busy supervisors and managers have to spend on project development and management.

When to use a project plan

Project planning is not just for the implementation of large projects with equally large budgets. Project plans can also be used for small projects or individual tasks. Whenever you have a task or project to do, using a project plan will help to ensure successful completion of the project expeditiously. It makes the "project head" think about and list all aspects of the project, including staff who should be involved, people who will be impacted, any resources needed, any communication that will be needed throughout the project, any possible risks or issues which may arise (and contingencies to deal with or prevent them), procedures/actions and timelines for project implementation and completion.

Within Lending Services at the University of Southern Queensland, we have used project plans for the following projects:

- Loans Policy changes
- Invoice Amnesty Project
- Curriculum Collection relabelling
- Big Books rebagging
- Pedagogical Resource Collection move
- Law Collection reclassification
- Copyright Sampling period
- Library Cleaning project
- Evacuation plans rewrite and training

Who should use a project plan

Project planning is not just for managers or supervisors. All staff have individual responsibilities, therefore all levels of staff are involved in carrying our projects. Simple project planning can be implemented by anyone. There are many benefits of involving staff in the project planning process. The project has a greater chance of success as input is received from a variety of people, staff feel ownership of the project and are more committed to its success. Staff at lower levels within organisations are action oriented. They tend to focus on their daily duties and responsibilities. Involvement in project planning forces them to consider the "big picture", and consider impacts on all library staff and patrons. On a personal level, it develops different skills and helps with career progression.

Writing the plan

There are innumerable books, websites and other resources which tell you have to write project plans. When involving staff, especially from lower levels, it is essential to make the process as simple as possible. By using a simple project plan template (see Appendix A), staff do not have to worry about what should be included in a project plan – it is all laid out. Constant use of the template will bring a sense of familiarity and diminish the fear which may arise when you ask staff to complete a project.

Initially staff are very wary of working with the project plan. The first time they use it, it is best for the supervisor or staff experienced with using the plan to complete it with them, explaining the various information that is entered into each section. Even when staff are familiar with the template, better results are often achieved by having several key staff complete the project plan together. By doing this, staff are able to brainstorm and ensure that all aspects are covered and all potential problems identified and addressed. It also helps to establish a sense of ownership of the project. If the staff complete the plan individually, the supervisor or relevant experienced staff should schedule a meeting to review the project plan jointly prior to project commencement.

The Project plan template

The project plan template in place at USQ includes the following sections.

- Project objectives
- Deliverables
- Stakeholders
- Issues, constraints, risks
- Resources
- Project Communication
- Procedures
- Timeline
- Project closure

Project objectives

A brief statement of what you want to accomplish – the final outcome.

Deliverables

Tangible items which will be produced or accomplished during the project. For example a project to implement a new fines policy could have the following deliverables – new fines information handouts, promotional leaflets, promotional signs.

Stakeholders

All those who will be involved in the project, need to be consulted about the project, or will be affected by the outcome. In a project to implement a new library fines policy this could include:

- Lending services staff creating the new policy
- Staff creating the new handouts
- Staff changing the website
- Systems staff making changes to the library management system
- All staff who serve on service desks
- Library management for approval of the new policy
- Library users who will be affected by the new policy
- Institution Finance departments.

Issues, Constraints and Risks

This is a vitally important part of the project plan where you identify any constraints on the project, any major issues which could impact the project or need to be considered, and any risks which might cause problems or delays with the project. For each issue, constraint or risk, a rating should be assigned and mitigating action decided upon. These actions will often be included in the procedures, or may only be needed if the issue/risk comes to pass. By thinking about these before the project

begins and planning for them, the occurrence of unwelcome “surprises” during the project should be minimised.

Resources

Before you start the project you need to identify all resources that will be needed. This includes staff needed to carry out the project, and how much of their time may be required. You should also list consumables that will be used, and identify any which will need to be purchased. You should also list any major items to be purchased (such as new shelving) and the source of funding to pay for them.

Project Communication

Communication about and during projects is often overlooked, but it is a key component in ensuring success of the project. In the project plan it is used to outline all aspects of communication before, during and after the project. Many of the communications will be to different project stakeholders. As well as deciding who you will be communicating with, the project plan also outlines what information needs to be communicated, how frequently the communication should occur, and what communication media is to be used. Examples of typical project communication include:

- Sharing the project plan with key members of the project team
- Seeking permission from management to carry out the project
- Consulting with interested parties to seek information
- Requesting specific work to be carried out
- Informing all staff of the project commencement and completion
- Informing relevant staff of changes/new processes
- Informing your users of changes before, during and after the project.

Procedures

The project plan should also include an outline of the procedures, including the staff member nominated to carry out the process. Any actions outlined in the Issues, Constraints, Risks section should be included in the procedures. Once the project commences, most of the focus is on the Procedures section, so it is wise to include Communications in the Procedures. The Procedures will often change throughout the project. It is useful if procedures are broken down into sections.

Timeline

Once the procedures are complete, the timings to complete each section should be estimated. This will include the amount of time needed to complete the action and the estimated start and finish dates. A Gant chart can also be drawn up which gives a visual representation of the project.

Project Closure

The Project Closure is a statement addressing the requirements which need to be fulfilled in order to consider the project closed. It is often a restatement of the objectives and deliverables, and may also include some of the final processes of the project.

Implementing the plan

Prior to beginning the project there are several important steps to take. The first is to circulate the project plan to key stakeholders – those who may have a role to play in the project or should be consulted to ensure all aspects have been included in the project plan. Secondly this is the time to assemble the project team. The initial meeting should include a review of the project plan, clarifying the project objectives, team member roles and duties. This will also give the project team members a chance to contribute to the project plan. They may identify issues which have been omitted from the plan.

During the project

At the start of the project scheduled regular meetings of the project team. These meetings are vital in keeping the project on track and continuing through to completion. At each meeting review the project plan. Check what has been completed, where continuing actions are at and what has not been started that should have been. Project timelines will often have to be reviewed as a result. Some issues or constraints which were not identified may become obvious during the course of the project. Update the project plan as necessary to take them into account, and recirculate the amended

plan to all key stakeholders. Note this on the project plan. Ensure the project communication schedule is followed, including regular updates to management and library staff.

Reviewing the plan

Follow up

For some larger projects, spin-off projects may be identified. It is best to separate these from the initial project and include them in the follow up section. With some projects, particularly those involving a new process, schedule a review at an appropriate time frame. This review may identify further work to be done, or even a new project.

Project Review

When the project is complete it is important to go through a review process. In this include all project team members and solicit feedback from key stakeholders. Identify what worked well and what didn't, and risks which became reality, any constraints or issues faced. Make recommendations for process changes to future similar projects.

Celebrating

Celebrate your accomplishment when finished. Many staff who have been actively involved in the project will feel a sense of self-accomplishment and pride. Publicly thanking and acknowledging their work will assist in the creation and maintenance of good morale within your team.