The Hard Task of Soft Skills: Project Management for the Materials Review Process

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Overview

• Before project management
• Why project management?
• The good, the bad, and the complicated
• Recommendations
Backstory: Serials Review 2017

SRP17 Summary of Process Recommendations:

- A Project Manager is needed to:
  - coordinate communications
  - avoid duplication of effort
  - monitor timelines
  - ensure reliable data and financial information
  - ensure staff have appropriate time to complete tasks
  - clearly define project goals and targets
- State priorities for project clearly
- State our projected cut target or target scenarios
- Determine the scope of materials to be reviewed
- Examine and decide on metrics to be employed
More Backstory: Serials Review 2017

- Scope
- Target
- Communication
- Decision-making
- Documentation
- Feedback
- Deadlines
How Did We Get Involved?

- Leadership changes
- Establish trust
- Accountability
TRLN Project Management Resources

- Group formed in 2017
- Developed PM Toolkit
- Led PM Training in 2018
What went well?

- Improved support and organization
- Opportunity to use project charter
- Helped with accountability
- Provided a buffer between/among stakeholders
- File corruption ceased to be a problem
- Planner used for the first time
- Assessment/post-mortem
What was difficult?

• Communication challenges 2018 vs. 2019
• Charter challenges 2018 vs. 2019
What was also difficult?

- Defining scope
  - Purpose and goals of the review
  - Dynamic budgets
  - Confusion over timelines
More Difficulties?

- Roles and responsibilities
- Leadership changes
- Staffing and capacity concerns
Yes, more difficulties!

- Consensus on data needs
- Data collection
- Vendor data
What happens in MRP20?

• Strategy, strategy, strategy
Recommendations

• Develop a culture of project management
  • Buy-in from leadership
  • Training for all staff
  • Be empowered to lead others via these principles and tools

• Shared understanding of the project goals
  • Use the charter
  • Refer to the charter
  • Check-in on team progress -- using the charter
Some more unsolicited advice

- **Do** implement project management processes iteratively
  - Don’t get discouraged if there are starts and stops

- **Do** get to know your stakeholders
  - Don’t assume that everyone has the same goals

- **Do** have a clear decision-maker
  - Don’t be afraid to ask them to intervene
Thank You!

Questions, comments, thoughts? Contact us:
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