

Kent
District
Library

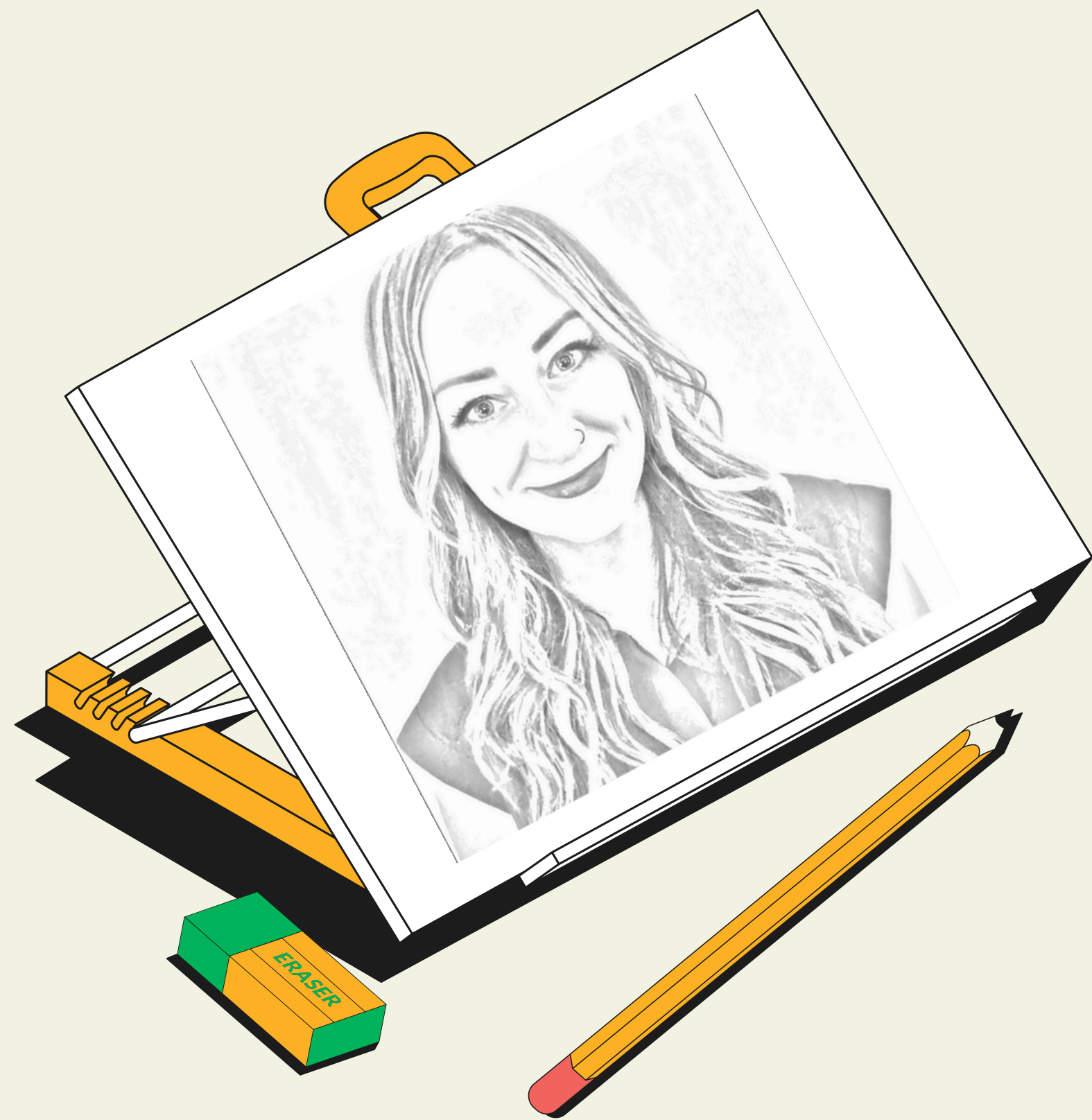
kdl.org



Project Management Remix:

Adapting Traditional Tools & Templates for Your Library Needs

jaci cooper



About Jaci


- Director of Projects and Planning @ KDL since 2020
- 8+ years library experience
- Yooper (Escanaba)
- 2013 NMU Graduate
- Finishing a dual MLIS/MPA degree from University of Missouri- Columbia
- PMI(WMI) member since 2020
- 2021 Urban Libraries Council Top Innovator Award for Project Dashboard
- 2024 40 under 40 Business Leader
- Coolest dog ever



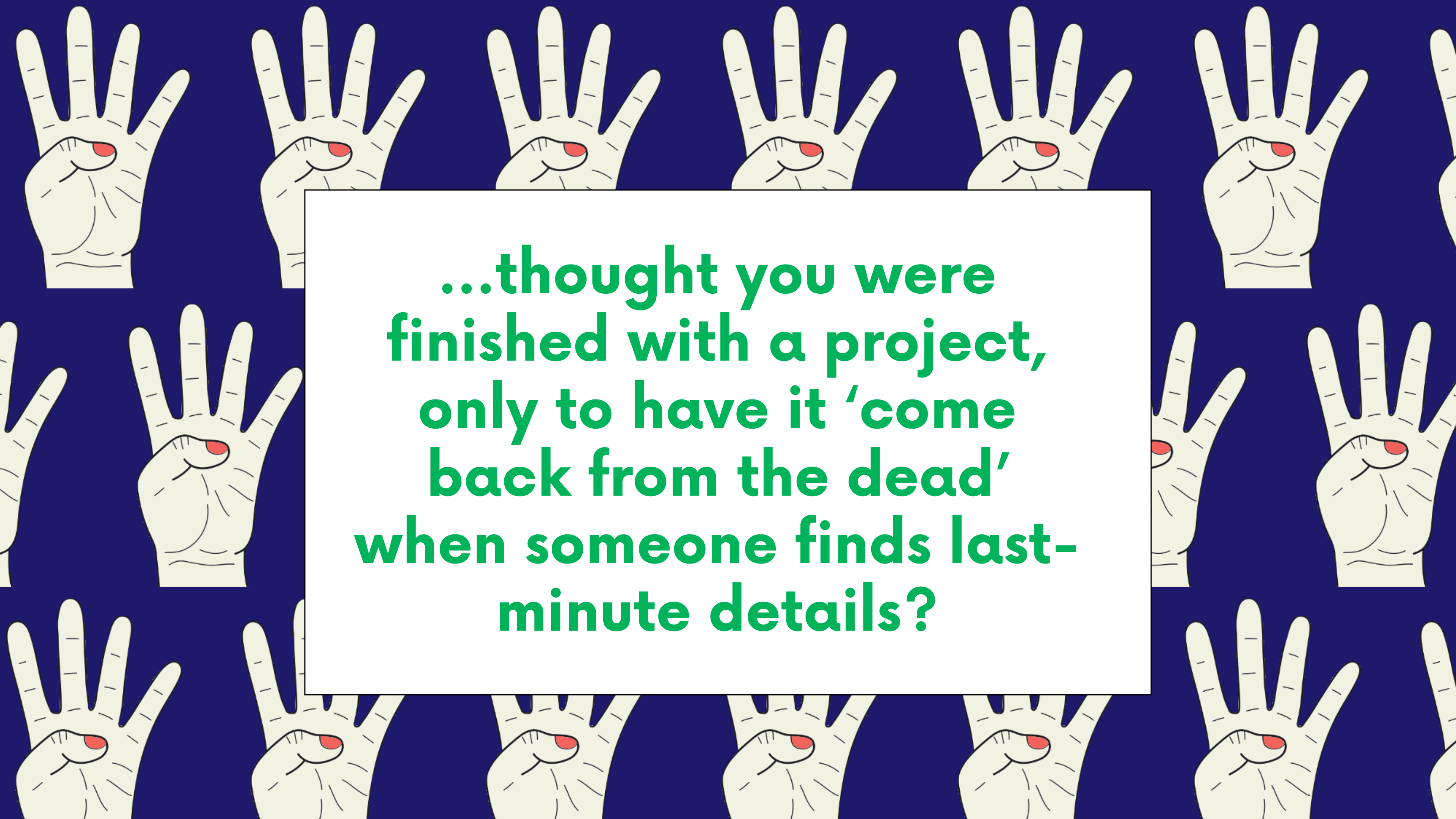
- Visit project problem areas and introduce tools and templates as solutions.
- Understand strategies for establishing centralized project communication and tools for library projects
- Gain techniques to empower library staff to take leadership roles in projects.
- Learn methods for setting and communicating clear expectations for project goals, roles, timelines, and deliverables



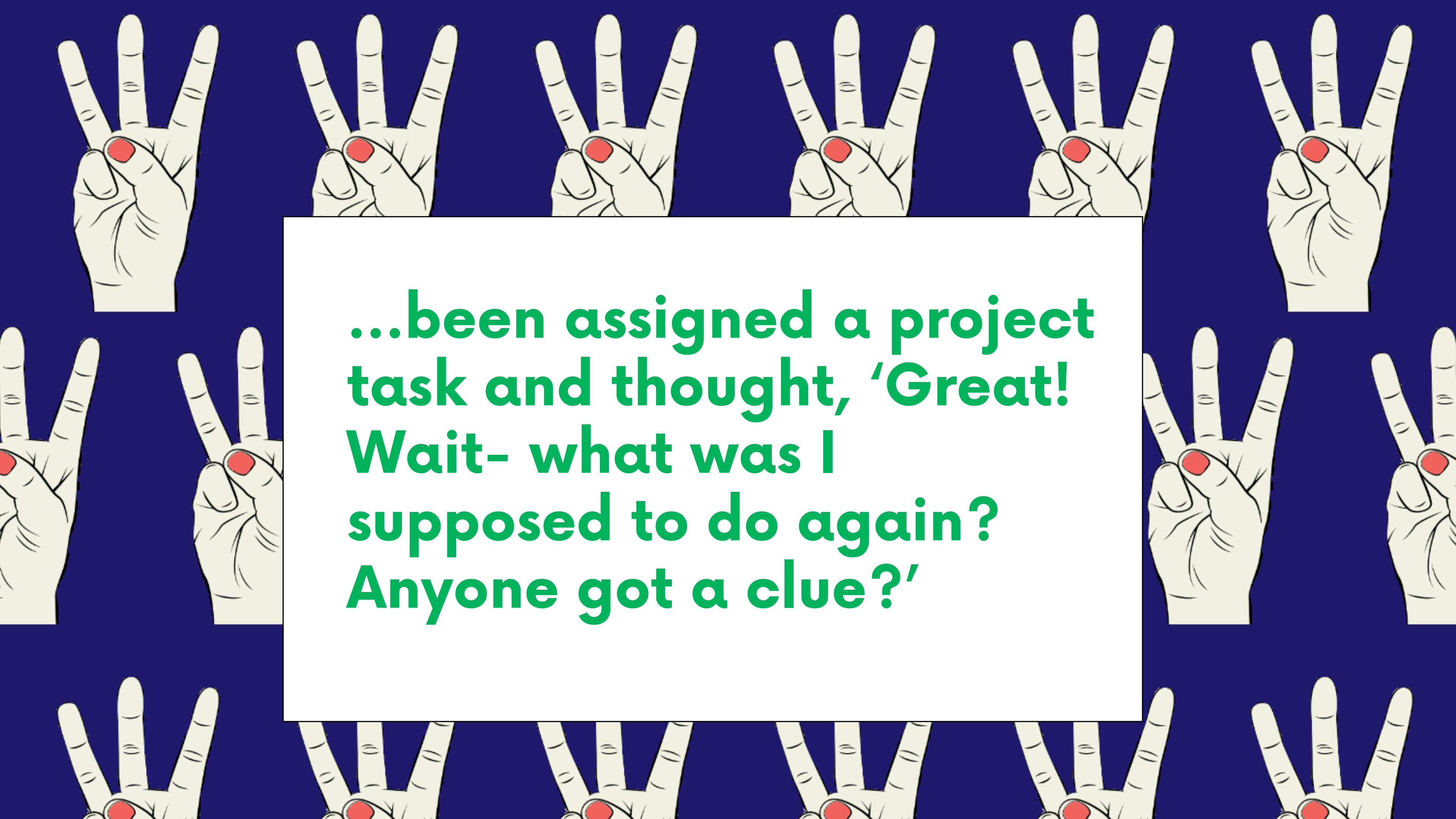
**Never Have I Ever....
Project Edition**




...been halfway through a project and realized... nobody's actually in charge?




**...thought you were
finished with a project,
only to have it 'come
back from the dead'
when someone finds last-
minute details?**



**...been assigned a project
task and thought, 'Great!
Wait- what was I
supposed to do again?
Anyone got a clue?'**



...kicked off a project full of enthusiasm, only to find out three months later that... wait, we're still on step one.



...been a victim of a project with tentacles. It began as one thing and now it is 37 things... and you cannot recall what the original goal was.



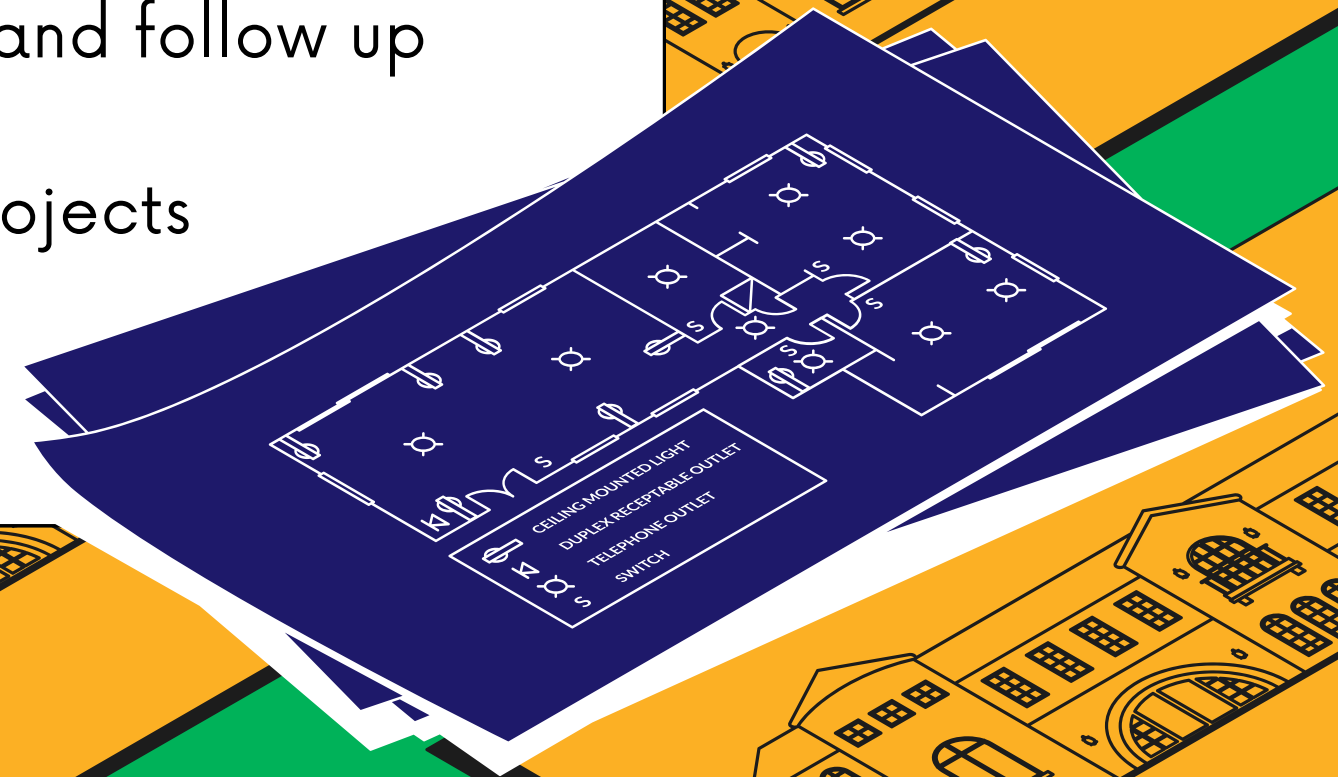
**Anyone still have
all 5 fingers up?**

Solidarity.

**Good news! You'll
probably get
something out of
this today!**

Establishing a PMO @ KDL

- Find others and learn (IT, medical, manufacturing,) PMIwMI was a great resource!
- KNOW your culture!
- Leadership & Management Buy In
- Document pain points--- and follow up with solutions
- Document Your current projects
- If it is easy it gets done
- Slow your roll...out





IS IT A PROJECT?

Must meet all four of these criteria

- Defined beginning + end
- Unique
- Brings about change
- Has risks + unknown elements

Only needs to meet ONE of these criteria

- Involves 3+ departments
- Involves 3+ branches
- Costs over \$30k (actual cost + labor)
- Requires 1k + hours to plan + execute
- Affects over 30 employees
- Has taxpayer visibility/is newsworthy
- Is regulatory or compliance
- Aligns with a defined strategic goal

PMO INVOLVEMENT?



Projects

VS



Operations

Temporary	▶	Definition	◀	Core Organization Function
New service, solution or program	▶	Objective	◀	Ongoing routine
Fixed duration with start + end date	▶	Duration	◀	Continuous + repetitive
Original work/ unique outputs	▶	Changes	◀	Stable + predictable

New internal software (Sort Assist)	▶	KDL Examples	◀	Provide Frontline Service
New external software (Bibliocommons Website)	▶		◀	Storytimes
Process improvement (PolicyTech to InfoHub)	▶		◀	Materials handling/delivery
A new program (On the Same Page)	▶		◀	Regular annual programs that don't differ greatly year to year (Summer Wonder, Let it Snow)

Tools & Templates

- Project Proposal Form
- Project Approval Process
- Project Dashboard/Register
- Project Charter
- Monthly Project Report
- Project Rollout Survey
- Project Close Out



PROBLEM(S):

We do not have a way to formally receive or review projects.

They either sprout out of nowhere (chaos) OR projects can only come from the top banana (no collaboration).

TOOL:

Project proposal form (MS Forms)


Project Proposal Form

Submit a project proposal here. If your submission has to do with programming (storytimes, branch programs, virtual programs, take 'n makes, systemwide programs, speakers or outreach), please use the programming idea form.


We request that as much research be done prior to submission as possible, including details related to budget, feasibility and data-driven deliverables. Further research may be required in order to obtain official project approval.

Hi, Jaci. When you submit this form, the owner will see your name and email address.


* Required

1. What is this project proposal called? * 


Enter your answer

2. Current State: What existing problem does this solve? (Please include any relevant data in your answer.) * 

Enter your answer

3. Future State: What solution does this propose? (Please include any relevant data, risks, goals and other results this project will deliver. If you are uploading attachments or graphics below, please summarize here how they support and/or illustrate your claim.) * 

Enter your answer

4. What are potential deliverables of this project? (i.e. promised outcomes or SMART goals). Please name at least 5. * 

Enter your answer

PROBLEM(S):

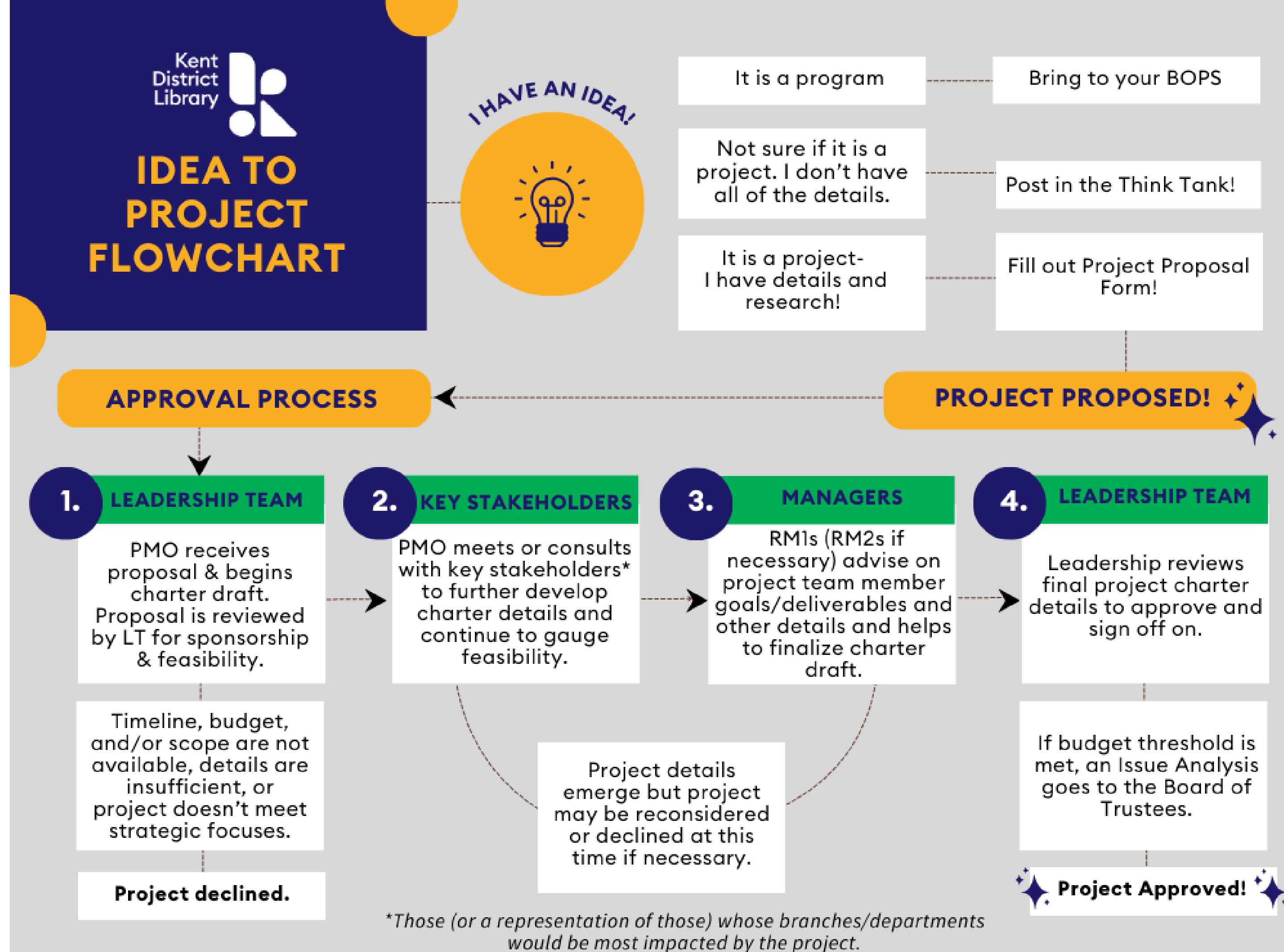
We do not have a way to formally or equitably approve or decline projects.

TOOL:

Project Approval Flow.

Infographic (Canva)

Regular meetings



Approved Project Register

Below is the list of current active, approved projects within our organization. ***SCROLL SIDEWAYS***

PROBLEM(S):

No one knows what projects are happening and projects all keep happening at the same time! We do not know what our organizational capacity for project work is.

TOOL:

Project register & dashboard (MS SharePoint).

Approved Project Register (Grouped by LT Sponsor)

The screenshot displays a SharePoint dashboard titled "Approved Project Register (Grouped by LT Sponsor)". At the top right, there are navigation options: "Open in SharePoint", "Filter (0)", and "Group by". The dashboard is organized into four columns, each representing a different LT Sponsor:

- Jaci Cooper (PMO):** Includes a "test 4.0" task and an "Intranet Revamp" project card. The "Intranet Revamp" card is categorized under "Technology" and shows 3 tasks, 0/6 completed, and a due date of 11/03/2025.
- Randy Goble (MarCom):** Includes a "Teen Graphic Novel Contest" project card. The card is categorized under "Core Programming" and shows 3 tasks, 1/6 completed, and a due date of 11/24/2025.
- Jennifer DeVault (Lib Ops):** Includes a "Physical Collection Audit" project card. The card is categorized under "Sustainability - 2023" and shows 4 tasks, 0/5 completed, and a due date of 12/16.
- Kurt Stevens (IT):** Includes an "Automated" project card. The card is categorized under "Technology" and shows 4 tasks, 2/2 completed, and a due date of 09/30.

Each project card features a title, a category banner, a list of tasks with completion status, and a due date. The cards are visually distinct with different background colors and banners.

PROBLEM:

- We're not sure who is in charge of a project.
- Scope Creep Keeps happening.
- Our project team is missing valuable perspectives.

TOOL:

Project charter
(MS Word).



PROJECT CHARTER

PROJECT NAME: <PROJECT TITLE>

PROJECT APPROVED	PROJECT DUE	STRATEGIC RELATION		
XX.XX.XXXX	XX.XX.XXXX	[SC] Strengthening Community	[Te] Technology	[CP] Core Programming

MEETING DATES & TIMES

CURRENT STATE (PROBLEM STATEMENT)

- This section clearly identifies the current situation and the associated challenges or problems that the project aims to address. It provides context and justifies the need for the project. These should ideally just be a few concise sentences that include summaries of data, trends, a gap analysis, and why it is important to prioritize this project.

FUTURE STATE (SOLUTION STATEMENT)

This section outlines the desired outcome of the project and the expected benefits of implementing the proposed solution. It describes the ideal future state that the project aims to achieve. This should also just be a few concise sentences as the project deliverables will provide more detail. This summarizes what KDL would look like if this project is executed perfectly to plan.

DELIVERABLES & MILESTONES

1. Deliverables

PROBLEM(S):

Low accountability from a project leader to keep projects moving forward.
Low awareness for project status.

TOOL:

Monthly Project Report (Canva) compiled from status updates (email & MS Word)



PROBLEM(S):

- There were issues about how a project was rolled out and they are never addressed (or sometimes even identified)
- staff feel like their feedback is not heard

TOOL:

Project Rollout Survey

1. Select your branch or department from the list. (Managers, please select RM1/RM2.) *

Select your answer



2. On a scale of 1 (lowest) to 5 (highest), how well do you feel you know/understand this new program, product, service, etc? *

1

2

3

4

5

3. On a scale of 1 (lowest) to 5 (highest), how comfortable would you feel training an employee on or walking a patron through this new program, product, service, etc.? *

1

2

3

4

5

4. Snag! Tell us about an issue you encountered in the rollout process. *

Enter your answer

5. Brag! Tell us about a positive encounter you've had with a patron or fellow staff member. *

Enter your answer

6. Any other comments, questions or feedback you would like the project team to consider?


Enter your answer

PROBLEM(S):

- We didn't do what we set out to do
- We are not sure if a project is done
- It is not clear who will "own" this after we roll it out.

TOOL:

Project Close Out Form
(MS Word)

PROJECT CLOSE OUT FORM			
Project Name			
Project Lead			
Timeline			
Vision			
Deliverables	Status	Comments	PMO:
1. Item... (copied directly from charter)	DONE		
	DONE		
	DONE		
	DONE		
	DONE		
	DONE		
Success Metrics:			
Budgeted Project Cost:			Actual Project Cost:
Success Metrics Complete? (Y/N)		Yes?	Comments:
Who will maintain this new product/service going forward?			
Where are files being transferred?			
LESSONS LEARNED			
What went well?			
What did not go well?			
What would you do differently next time?			
SIGNATURES			

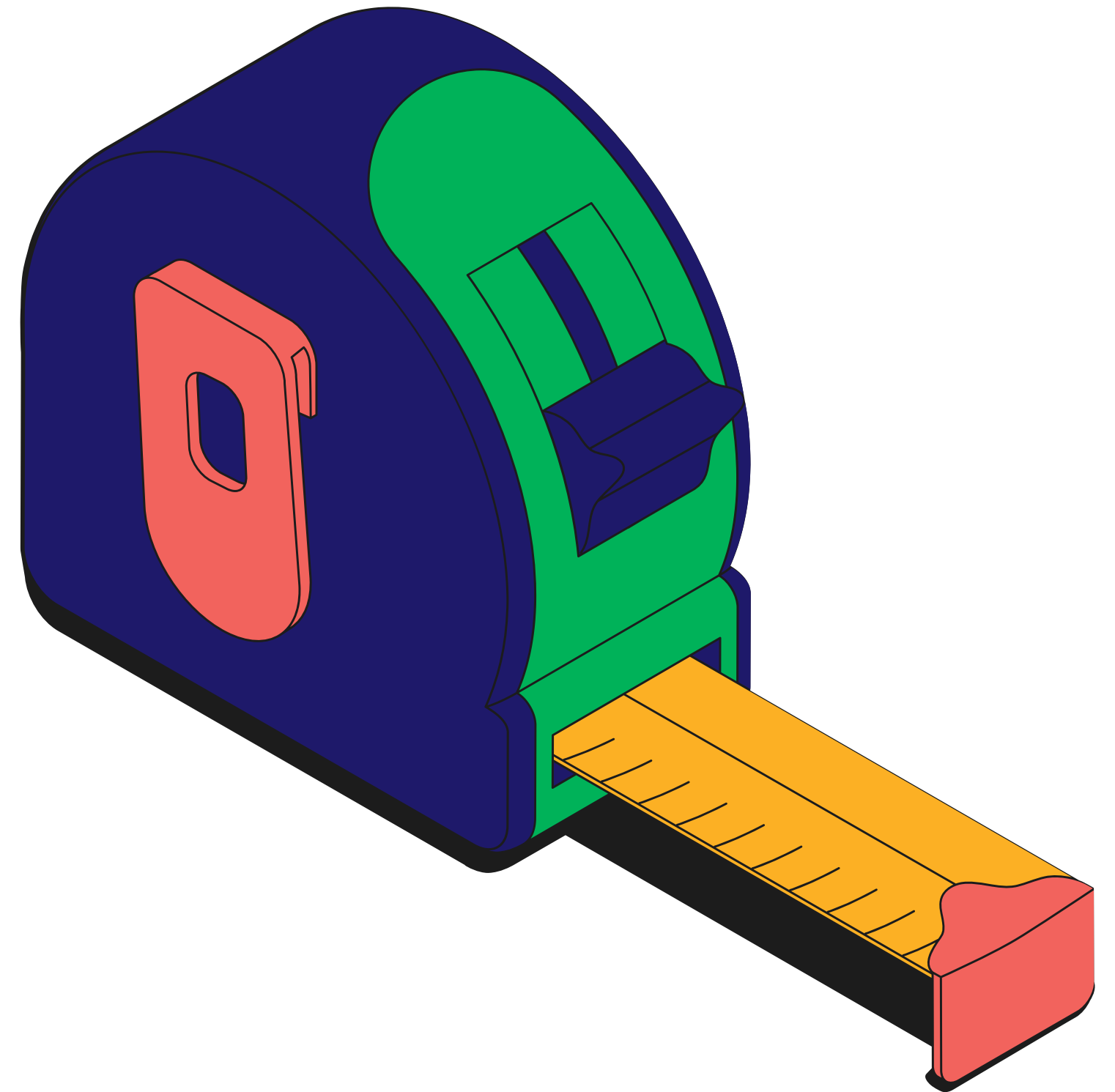
Other Tools

Project Plan (MS Planner)

Project Leader Checklist (Canva)

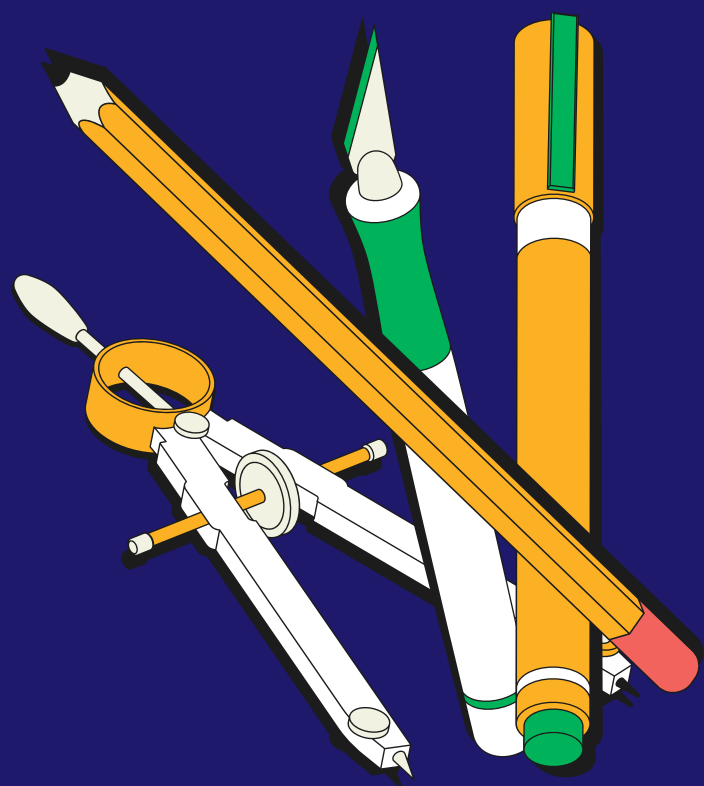
Project Leader Training (Video)

Known Issues List (Excel)



Project Management Toolkit

via dropbox



Questions?

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Information  Ideas  Excitement!

