I have an IDEA:
Low Barrier Project Management for Effective Resource Allocation

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Maximizing Your Resources – Saving $$, Saving Time
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Learning Outcomes

• Identify parts of a **project life cycle** in order to consider **demand** workflows

• List **goals** for developing a process in order to **create a process** that works for your organization.

• Understand the **IDEA document** in order to **transfer** the concept to your context.
Is this a project?

The work in libraries is complex. Not everything is a project, work can also be tasks, initiatives, programs, or operational. Projects are temporary and unique.

Temporary
- Start time and End time
- Can move to operational
- Broken into phases
- Could be pilots or experiments

Unique
- Outside of the normal duties of an individual or unit
- Can be the creation of a product, deliverable, documentation, policy, or service
## Process Goals

<table>
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<tr>
<th>Low Barrier to entry</th>
<th>Easy to create and understand</th>
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<tr>
<td></td>
<td>Exit points</td>
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<td></td>
<td>Matches mental model</td>
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<tr>
<td>Low Costs</td>
<td>Work with what you already have</td>
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<td></td>
<td>Technology is not a burden</td>
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<td>Reduce upkeep cost</td>
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<td>Right sized</td>
<td>Only add process when it is a value add</td>
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<td></td>
<td>Flexible complexity not complicated</td>
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<td>Process not documentation</td>
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</table>
PMBOK Knowledge Areas

- Scope
- Time
- Cost
- Quality
- HR
- Communications
- Risk
- Procurement
- Stakeholder

Integration
IDEA Document

Idea: [name of idea]

Started Discussion Date: [when would you consider the start of this project to have been]
Desired Project Close: [when would you like something available for end-users or project complete]
Idea Owner: [who owns the project idea (often the potential project manager)]
Submitted by: [who has written this document]
Funding Needs: [will your project need funding, anticipated source (BTL, donors, etc.), anticipated costs]

Identify
[use this section to identify the general idea or rationale for the idea and the value to organization]

Define
Project will include:
- [what are you anticipating will need to be done. This does not need to be comprehensive but just generally, what are you thinking about for your idea]
Project will not include: [if applicable]
- [what would not be a part of this project]

Expand
[use this section to add any additional details about the project scope, budget, assumptions, constraints or any information about why this project is important]

Authority and Stakeholders
[use this section for listing, to the best of you knowledge, who or what group will be need to do any work for the project, who would approve the project, who or what group might need to change because of the project, etc.]

[use subsections as appropriate: Sign-Off, Potential Team members, Stakeholders, Project Manager etc]

Notes [if applicable]
[use this for any additional notes that didn’t fit into the other sections, links to related resources or examples, anything that might help others understand your idea]
<table>
<thead>
<tr>
<th>IDEA Doc</th>
<th>Knowledge Area</th>
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<tr>
<td>Title and metadata</td>
<td>Timeline, Cost, Integration</td>
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<tr>
<td>Identify</td>
<td>Stakeholder, Communication</td>
</tr>
<tr>
<td>Define</td>
<td>Scope, Risk, Cost</td>
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<tr>
<td>Explain</td>
<td>Procurement, Cost, Quality, Risk</td>
</tr>
<tr>
<td>Authorize</td>
<td>Stakeholder, Communication, HR</td>
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</table>
Example

Idea: Library System Status V2

Started Discussion Date: 4/20/2018
Desired Project Close: 7/1/2018
Idea Owner: Beth German
Submitted by: Doug Hahn

Identify
The University Libraries operate a complex web ecosystem with many components and parts. In order to increase the transparency of the ecosystem to develop a Library Services Status System. An initial version was developed to act as a status board. This version of the service is to solicit better input and feature requests for service improvements.

Define
Project will include:
- Integrating a feature request system in to the current Library Service Status System
  - Any TAMU affiliate can submit a feature request or an idea tied to a particular service
- Development of a product owner dashboard
  - Product owner ability to allow voting on a feature request
  - Product owner can approve features for sprint time or a help desk ticket

Project will not include:
- General feedback or help desk system

Expand
- Original scoping for features are User Story #6 and Feature #4: https://docs.google.com/document/d/1cECXLvafldzDAHorVgzF-LIXf6E-SD5fxfZinnKUKs/edit?usp=sharing
- Approved features will be automatically ingested into Version 1
- Suggested features can be also turned into a help desk ticket (sugar).
- Requests and ideas should not be anonymous. The product owner should be able to find contact information of the requester in order to follow up.

Authority and Stakeholders
Sign Off
- Susie Goodwin, Associate Dean for User Services
- Mike Bolton, Assistant Dean of Digital Initiatives

Project Partners
- Beth German, sprint customer

Stakeholders
- Web Governance Team
- Service managers and product owners within the Web Ecosystem

Notes
- Project Manager - Doug Hahn
- Sprint Customer - Beth German
- Library System Status V1 Idea doc: https://docs.google.com/document/d/1yus2sGYaN-jpZIKN0PjP4e9VBF0v0RP58OowPJ2yEdA/edit?usp=sharing
- V1 initial requirements: https://docs.google.com/document/d/1cECXLvafldzDAHorVgzF-LIXf6E-SD5fxfZinnKUKs/edit?usp=sharing
- Web Ecosystem Roles and Definitions: https://docs.google.com/document/d/1M38x1XGzeH940QOYd6X4nP-oGj-RSuriH1v-6pg5E/edit?usp=sharing
Example

Idea: Furnishing for Evans Grad Spaces

Started Discussion Date: 3/19/2018
Desired Project Close: 12/31/2018
Idea Owner: Kathy Anders
Submitted by: Kathy Anders

Identify
Graduate students face a short supply of common spaces across campus due to the reduction of departmental study spaces and the increasing amount of students. This project is to improve the furnishing and usability of the 6th floor Evans Graduate Lounge and Graduate Writing Space in order to better meet the needs of graduate students. The space is currently outdated and a funding opportunity has presented itself which goes to indicate that now is a good time to tackle this issue.

Define
Project will include:
- Conduct survey to identify types of furniture pieces that students want
- Determine budget
- Test furniture with students
- Determine furniture pieces and design layout of spaces
- Review power situation and determine if and where additional power will be needed.
- Purchase, assemble, and place furniture
- Design additional signage

Project will not include:
- Additional data or technology
- Construction or changes of layout
- Amenities such as microwaves, vending machines, kitchen, etc.
- Controlled access
- Additional spaces outside of the lounge and writing space

Expand
- Timeline will determined by the Associate Dean for User Services
- Removal of existing furniture will be done as needed
- Given funds, project might include decarpeting of walls and painting as needed

Authority and Stakeholders
Sign-Off
- Susie Goodwin, Associate Dean for User Services
- Pixey Mosley, Associate Dean of Faculty and Facilities Services

Project Team Members
- Stephanie Walker, Facilities

Partners
- Mo Tan Cheng, Business and Employee Services
- Jim Smith, Facilities
- Patrick Zinn, Marketing

Stakeholders
- OGAPS
- AskUs

Notes
- Typically 6-8 weeks for furniture deliveries
- [Original rationale document]
Example

Idea: Increase VM Capacity

Started Discussion Date: 2018-02-15
Desired Product Release: 2018-08-31
Customer: Mike Bolton, Digital Initiatives
Submitted by: Michael Bolton

Identify

The DAME, as well as FOLIO, are either ready for production level operations or are upgrading to a new level of testing and development. The activity and load will increase for both services as production assets are added to the digital asset management systems and the Alpha and Beta versions of FOLIO are deployed on premise. To support this upick in activity, additional hardware, in the form of intel-based servers, will need to be added to the infrastructure to support new virtual machines as well as a raft of Docker instances. This STL item is for the purchase of a large, Dell infrastructure server to be added to the existing server farm managed by Digital Initiatives.

Define

Project will include:

- Acquisition of Dell server to match or integrate with the existing server infrastructure maintained by DI
- Install appropriate operating environment
- Integrate the new service with the current production virtual server infrastructure

Project will not include:

- Deployment of FOLIO or any other application environment. This upgrade will provide infrastructure support. Installation of application software and services will be left to other groups in DI
- This upgrade is for the primary server farm and will not target redundant operations at an offsite location.
- This acquisition will not expand the current storage subsystems.

Expand

- When the new server has been certified for operation by the System Administration team within DI, the Developers and Applications Support teams will be able to create new virtual environments to host the services used in FOLIO and the DAME.
- FOLIO introduces a new virtualization environment that uses Docker technology to isolate the various services. This is a slight change from the current Vagrant methodology so there will be an education curve for this deployment. That is not specifically a function of installing the server but is a result of the deployment of FOLIO.
- Acquisition of this unit will be later in the fiscal year and will involve some planning and coordination with other units in DI. It may be this unit will go into the new West Campus Data Center as part of the transition to WCDC. That will be discussed in conjunction with DI’s plan to move from Fibertown to the new campus facility.

Authority and Stakeholders

- Digital Initiatives, Mike Bolton along with managers for the teams that will utilize the new virtual environment (FOLIO and DAME)
Choosing IDEAS

Documentation
- Must have idea document to be in the running
- Use idea document to generate buy in

Assessment and Risk
- Numerical assessments
- Considerations for accessibility and inclusion

Shared Process
- Internal resources allocation between units
- Allocate resources at time of need

Capacity
- Train in order to grow potential
- Document velocity and performance indicators
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Thank you!

Questions?
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@eligerman