



# I have an **IDEA:**

Low Barrier Project Management  
for Effective Resource Allocation

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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

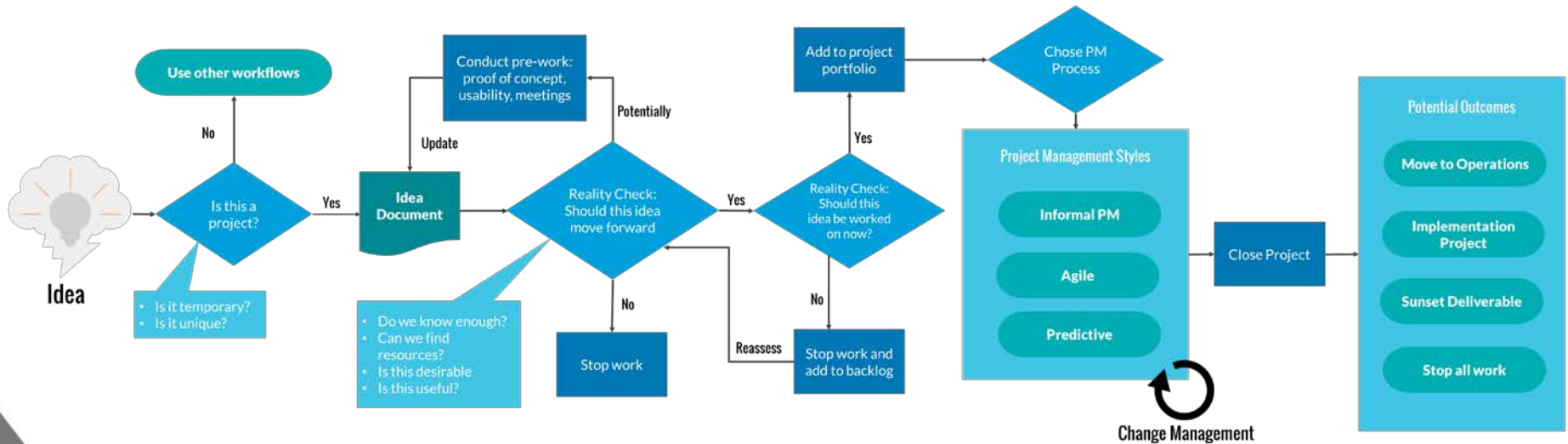
# Project Life-Cycle

Ideation

Demand Workflow

Project Management

Future Directions



# Process Goals

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Low Barrier to entry

Easy to create and understand

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Exit points

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Matches mental model

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Low Costs

Work with what you already have

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Technology is not a burden

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Reduce upkeep cost

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Right sized

Only add process when it is a value add

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Flexible complexity not complicated

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Process not documentation

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# PMBOK Knowledge Areas



# IDEA Document

Idea: [name of idea]

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**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]

# IDEA & PMBOK

IDEA Doc	Knowledge Area
Title and metadata	Timeline, Cost, Integration
Identify	Stakeholder, Communication
Define	Scope, Risk, Cost
Explain	Procurement, Cost, Quality, Risk
Authorize	Stakeholder, Communication, HR



# Example

## Idea: Library System Status V2

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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/1cECXLvalfudzAHorVqzF-LIXf6E-SD5fxZinnKUKs/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/1wus2sGYaN-ipZIKN0PjP4e9VBfOv0RP58QowPJ2yEdA/edit?usp=sharing>
- V1 initial requirements:  
<https://docs.google.com/document/d/1cECXLvalfudzAHorVqzF-LIXf6E-SD5fxZinnKUKs/edit?usp=sharing>
- Web Ecosystem Roles and Definitions:  
[https://docs.google.com/document/d/1M38xlXGzeH940GOYd6Xs4n-\\_oG-I-BSurH1u-6pqq5E/edit?usp=sharing](https://docs.google.com/document/d/1M38xlXGzeH940GOYd6Xs4n-_oG-I-BSurH1u-6pqq5E/edit?usp=sharing)

# Example

## Idea: Furnishing for Evans Grad Spaces

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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 and writing space

### Expand

- Timeline will determined by the Associate Dean for User Services
- Removal of existing future 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

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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 uptick 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 BTL 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

# Project Portfolio

	B	C	D	E	F	G	H	I	J	K
1	Project Name	Project Manager	Project Consultant	Project Sponsor	URL	Project Status	Project Health	Funding Status	Start Date	Planned End Date
2	Library System Status	Beth German	Beth German	Susie Goodwin	<a href="https://docs.google.com/c">https://docs.google.com/c</a>	Closing ▾	Good ▾	Not applicable ▾	1/1/2017	4/1/2018
3	Header Standardization	Beth German	Beth German	Susie Goodwin	<a href="https://docs.google.com/c">https://docs.google.com/c</a>	Closing ▾	Worried ▾	Not applicable ▾	1/1/2017	4/1/2018
4	Thermal counters @ MSL	Bill Chollett	Robin Sewell, Bill Chollett	Esther Carrigan	<a href="https://drive.google.com/c">https://drive.google.com/c</a>	Execution ▾	Good ▾	Funding Allocat ▾	9/1/2017	4/30/2018
5	Lockers for Preservation	Julie Mosbo	Jim Smith, Crystal Vinal	Paula Sullenger	<a href="https://docs.google.com/c">https://docs.google.com/c</a>	Execution ▾	Good ▾	Funding Allocat ▾	1/1/2018	5/1/2018
6	LIMB Server Workflow Management Software	Julie Mosbo	Bill Chollett, Crystal Vinal	Paula Sullenger	<a href="https://docs.google.com/c">https://docs.google.com/c</a>	Execution ▾	Good ▾	Funding Allocat ▾	9/1/2017	5/1/2018
7	Cascade Updates	Tina Phillips	Beth German	Susie Goodwin	TBD	Execution ▾	Good ▾	Not applicable ▾	1/1/2017	6/1/2018
8	BUS/ER Office Remodel	Jim Smith	Crystal Vinal	Pixey Mosley	<a href="https://drive.google.com/c">https://drive.google.com/c</a>	Execution ▾	Good ▾	Unknown ▾	9/1/2017	7/1/2018
9	Preservation Microsite	Julie Mosbo	Beth German	Susie Goodwin	<a href="https://drive.google.com/c">https://drive.google.com/c</a>	Planning ▾	Good ▾	Not applicable ▾	1/22/2018	7/1/2018
10	WCL 127 Remodel	Jared Hoppenfeld	Bill Chollett, Beth German	Susie Goodwin	<a href="https://docs.google.com/c">https://docs.google.com/c</a>	Execution ▾	Good ▾	Funding Allocat ▾	9/7/2017	7/31/2018
11	Move 2x2s	Patrick Zinn	Jim Smith, Bill Chollett, Beth German	David Carlson	<a href="https://drive.google.com/c">https://drive.google.com/c</a>	Planning ▾	Good ▾	Funding Allocat ▾	3/1/2018	7/31/2018
12	Wayfinding Signage	Patrick Zinn	Jim Smith, Beth German	David Carlson	<a href="https://docs.google.com/c">https://docs.google.com/c</a>	Execution ▾	Good ▾	Funding Allocat ▾	2/15/2018	7/31/2018
13	Kaplan	Julie Mosbo	Julie Mosbo	Paula Sullenger	<a href="https://docs.google.com/c">https://docs.google.com/c</a>	Execution ▾	Good ▾	Funding Allocat ▾	2/14/2018	8/14/2018



# Thank you!

## Questions?

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