

2020

## Review of Project Management in Libraries

Lydia Tang

Michigan State University, ltang5@msu.edu

Follow this and additional works at: <https://elischolar.library.yale.edu/jcas>



Part of the [Archival Science Commons](#)

---

### Recommended Citation

Tang, Lydia (2020) "Review of Project Management in Libraries," *Journal of Contemporary Archival Studies*: Vol. 7 , Article 6.

Available at: <https://elischolar.library.yale.edu/jcas/vol7/iss1/6>

This Book Review is brought to you for free and open access by EliScholar – A Digital Platform for Scholarly Publishing at Yale. It has been accepted for inclusion in Journal of Contemporary Archival Studies by an authorized editor of EliScholar – A Digital Platform for Scholarly Publishing at Yale. For more information, please contact [elischolar@yale.edu](mailto:elischolar@yale.edu).

**Carly Wiggins Searcy. *Project Management in Libraries*. Chicago, IL: ALA Editions, 2018.**

The term “project management” brings to mind images of executive boardrooms or software teams, but projects on a large and small scale happen every day within a library. While many library science programs equip students with technical expertise, not many programs specifically offer project management training. Drawing upon over twenty years of working in public, special, and academic libraries as well as her formal training as a certified project management professional, Carly Wiggins Searcy provides a lean but approachable guide to project management applied to libraries. Using recognizable library-related scenarios, Searcy demystifies and clarifies the relevance of project management techniques for libraries to be—as the title tagline states—“on time, on budget, [and] on target.”

Spanning fifteen chapters in 112 pages, *Project Management in Libraries* is a low-barrier introduction particularly useful for librarians and archivists new to the concepts of project management and short on time and confidence. As stated in the introduction, this book is not intended to be a guide for gaining certification from the Project Management Institute but translates fundamental project management concepts into the library realm. Each chapter ranges from four to twelve pages. Some chapters begin with humorous and wry quotes, such as Douglas Adams’s “I love deadlines. I love the whooshing sound they make as they fly by” (page 67). Chapters frequently feature a flow chart, template, or other visual or interactive component. Each chapter concludes with a “summing up”—a bulleted list for readers to easily review key takeaways and citations for additional recommended readings.

As Searcy describes, frequently library project managers have the unenviable position of someone with high responsibility but low authority. In order to organize and keep everyone on track, project managers must be tenacious, but tenacity by itself is ineffective without soft skills, collaboration, and ethics. Acknowledging this awkward balance of power and responsibility, Searcy outlines tactical strategies for gaining staff buy-in. A particularly helpful chapter on meeting management (chapter 3) provides advice on preparation, protocols, facilitation tactics, etiquette, and what to do when meetings go wrong.

Searcy evaluates project management tools including the Microsoft Project, Oracle Primavera, HP Project and Portfolio Management (PPM), GanttProject, Basecamp, Trello, and Asana on functionality, cost, and ease of use. Although the evaluations were thorough, it might also be helpful to unpack the organizational concepts behind these tools to clarify their differences, such as when and why someone might want to use a Kanban board versus a Gantt chart. As the author acknowledges, project management programs are constantly emerging and evolving. Other powerful tools not mentioned include Confluence and the related issue tracker Jira, and Air Table.

Unlike regular ongoing operations, projects, by nature, cycle through the following stages of initiation, planning, executing, monitoring and controlling, and closing.

### *Initiating*

Write the project’s charter stating the purpose, objectives, success criteria, requirements, constraints, risks, and timeline. Assess the stakeholders in their interest and influence levels on the project, and note their preferred communication style.

### *Planning*

One of the largest pitfalls of a project can be when requirements, scope, expectations of deliverables, estimations of risks, and budgets are not sufficiently addressed. When planning, it is important to discover, record and review, and obtain approvals. Each sentence is impactful with helpful steps, particularly the value of one-on-one interviews to gain a variety of perspectives on the project.

Although somewhat challenging to follow, Searcy provides a mathematical formula to rank and rate risks (chapter 9) and plan scheduling (chapter 10). She additionally touches upon useful accountability strategies (particularly in chapter 11), such as the acronym RACI as a way to quickly grasp roles of accountability into action:

- Responsible: person/people who are in charge accomplishing the task
- Accountable: ideally a single person who ensures the accuracy and quality of the tasks being done
- Consulted: include subject matter experts and others whose work is impacted by the project
- Informed: the person(s) who receive the finished product and need to stay informed on progress

The chapter on budgeting (chapter 12) discourages the practice of padding a budget but recommends a “contingency management reserve” that could be allocated as needed for unforeseen additional expenses. The formulas that Searcy provides for estimating the budget and schedule are complex but potentially useful.

### *Executing*

Searcy briefly introduces Agile, a project management style adopted by software engineers. The Agile concept has a few defining characteristics, such as daily standing check-ins, when members briefly describe what they worked on yesterday, what they plan to work on today, and any obstacles they currently are facing. Another practice briefly described is Scrum, which is a two-week sprint cycle of work followed by assessment, refinement, and adjustment. However, the explanation and coverage of Agile is surface-level, at best.

### *Monitoring*

Having awareness in communication effectiveness means being aware of your own communication practices and cognizant of any drawbacks. The larger the team or organization, the more complex the communication requirements, and Searcy identifies specific approaches such as interactive, push (such as emails), and pull (requiring members to seek out the communication, such as logging into a system).

During the process of monitoring the project’s progress, Searcy cautions that people usually do what is inspected. Hold people accountable by checking work, catching errors early, and retraining as necessary.

### *Closing*

Closing a project often is overlooked in rushing onward to newer projects, but the process of closing a project is to accept deliverables, settle accounts, document lessons learned, create and present the final report, reassign resources, and celebrate its end.

As mentioned before, project management is often discussed in the business, engineering, and technology sectors, but not as overtly within the libraries and archives world. Peer publications include Julie Carpenter's 2011 monograph, *Project Management in Libraries, Archives, and Museums: Working With Government and Other External Partners*. Carpenter's book, spanning 205 pages, is vastly more detailed and specifically emphasizes collaborating with government and other external partners centered upon the UK. Other LIS-oriented publications include Barbara Allan's *Project Management: Tools and Techniques for Today's ILS Professional* (2004), and Margot Note's *Project Management for Information Professionals* (2016). Note's book is the only one to directly reference archives among project management examples, including Searcy's book, which is entirely focused on library examples. Particularly applicable to archivists is a 2018 article in *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage*, vol. 19, no. 2, by Cyndi Schein, Hannah E. Robinson, and Hana Gutierrez, titled "Agility in the Archives: Translating Agile Methods to Archival Project Management." Other examples of project management tools applied to archives include Weatherly Stephen and Rachel Searcy's "ArchivesSpace and Airtable for Improved Workflow Management" webinar for the Society of California Archivists and Becky Briggs Becker's review of Trello for the *American Archivist*. The Digital Library Federation Project Managers Toolkit is an effective free project management resource, although without the examples, templates, and elaborations that enrich Searcy's book. Another resource to consider is going straight to the source: the Project Management Body of Knowledge (PMBOK) published by the Project Management Institute, although this may be intimidating or off-putting with its business-oriented jargon, length (over 750 pages), and approach. For hands-on archives-specific project management training, the Society of American Archivists offers Fundamentals of Project Management and Advanced Project Management in-person workshops.

Ultimately, the individual reader would need to assess the specific level of guidance they need for project management and the types of projects they anticipate managing. Searcy's book succeeds in creating an easy-to-read and succinct resource for librarians to learn about project management, building connections between project management techniques, and recognizable application within the library realm. While the recommendations in the book are useful, if someone is comfortable with leaner guidance or already has some experience with project management, it may be worth exploring the Digital Library Federation Project Managers Toolkit and other free online resources first.

## References

- Becker, Becky Briggs. "Trello," *American Archivist*, July 19, 2019, <https://reviews.americanarchivist.org/2019/07/19/trello/>.
- "Project Managers Toolkit." Digital Library Federation. Accessed January 14, 2020. [https://wiki.diglib.org/DLF\\_Project\\_Managers\\_Toolkit](https://wiki.diglib.org/DLF_Project_Managers_Toolkit).
- Note, Margot. *Project Management for Information Professionals*. Amsterdam: Chandos Publishing, 2016.
- Schein, Cyndi, Hannah E. Robinson, and Hana Gutierrez. "Agility in the Archives: Translating Agile Methods to Archival Project Management." *RBM: A Journal of Rare Books*,

*Manuscripts, and Cultural Heritage*, vol. 19, no. 2, 2018.

<https://rbm.acrl.org/index.php/rbm/article/view/17418>.

Stephan, Weatherly and Rachel Searcy. "ArchivesSpace and Airtable for Improved Workflow Management." Webinar. Society of California Archivists. December 19, 2019.

<https://calarchivists.org/event-3625825>.