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Ad Astra per Aspera: Aspiring to Excellence in Challenging Times

"Putting Up" Stories for the Future: The Southeast Kansas Oral History Project

Morgan O.H. McCune
Pittsburg State University
Pittsburg, Kansas

Abstract

This article examines the first phase of a small, collaborative digital project in terms of project life cycle, including a review of general project management literature focused on the library and information services field. The project is the Southeast Kansas Farm History Oral History Project. Published on the web using OCLC's CONTENTdm software, it contains oral history of southeast Kansas farm residents in the form of sound recordings, transcripts, and photographs. The project is a joint project between Axe Library Special Collections of Pittsburg State University, the Southeast Kansas Farm History Center, and the Parsons Public Library.

Cress: And do you remember how your family processed your food? Did your mother can?

Fred: My mother canned. Every year she canned a bunch of it. That was the only way you kept it then.

(Black, Fred, 1930-, interview with Pamela Cress, June 15, 2009, p. 7 of transcript;

<http://axedigital.pittstate.edu/cdm-sekfarm/index.html>)

Pittsburg State University's Axe Library acquired OCLC's CONTENTdm Digital Collection Management Software in order to begin digitizing certain special collections so they would be available to a wider public, so they would be better preserved, and so researchers would have greater immediate access to these collections. In essence, we're "putting up" information so we can keep it and make it useful. Even on a small scale (currently less than 2000 items in 8 "published" collections), the details of the projects are a job to manage, considering that different departments of the library are involved in the work, and that several steps are needed to bring each project to fruition. Since staff members involved in digital collections work juggle many other projects and duties, it is sometimes difficult to sustain momentum, ensuring that digital projects are controlled, completed, and promoted appropriately. So far, the projects have been accomplished ad hoc, with only minimal overall project management. In the latter half of 2010, the Special Collections Department of Axe Library embarked on its first collaborative project, *The Southeast Kansas Farm History Oral History Project*, which added a level of detail to the workflow that demands analysis. This paper will examine the collaborative project, and try to identify project management models or tools that can be used to help manage future digital activities and other small projects as well. While many project management models are suited to much larger projects (ILS implementation or new building design, for example) there may be a "project management lite" that could be adapted to improve workflows at Axe. In effect, the purpose of the paper is to help us learn the best technique of "putting up" stories for the future, in much the same way as Kansans learned from their relatives how to preserve food so it might not be lost. As busy, multitasking librarians, working toward multiple objectives to serve our institutional missions, we must ensure that the projects on which we work succeed, and that every minute we spend on them counts toward success.

Literature Review

The literature is full of business-focused project management guides from the very technical *PMBOK Guide* (Project Management Institute, 2004) to the inevitable *The Complete Idiot's Guide to Project Management* (Baker & Baker, 1998). Since project management is such a large and varied field, this study will focus only on project management in libraries. A review of the resulting literature makes it clear that library resources on project management are relatively few, that professionals in the field are aware of the knowledge gap, and that existent resources are often focused on one type of library project, such as management of ILS projects, building projects, or digital projects. Although the project in question is a digital project, its nature as a small project with no budget or timeframe makes a general study more potentially useful. Axe Library staff is involved in occasional large projects, but the vast majority of Axe projects are similar in scope to the project here studied. Literature found in a review of WorldCat and LISTA (Library, Information Science, and Technology Abstracts) shows a concentration of literature on general project management in libraries in the late 2000's, some possibly generated in response to, or inspired by, Barbara Allen's much-quoted book *Project Management* (Allen, 2004).

The benefits of Allen's book include a full coverage of the project life cycle, defined as: project analysis, project plan, project implementation, and project evaluation and dissemination. She also covers budgets, using information and communications technology (ICT) to control projects, and working with people and other institutions. Her examples make it clear that the text considers many different types of projects. "ILS workers often carry out these projects alongside their 'full-time job' and find that they need to develop new skills and ways of working in order to successfully manage their project as well as their main work role" (p. 3). However, much of her advice is difficult to apply to a small project. The project management ICT she covers are MS Project and PRINCE2 (p. 123-124). Although Zhang & Bishop successfully use MS Project on an e-reference implementation project (2005), it is too expensive to consider adding at Axe Library. PRINCE2 is an open-source UK government standard that reads like AACR2; it is too complicated to easily apply to a small project. Stanley, Norton & Dickson outline a pilot project in a UK Library that

required a day of training in the methodology (2003, p. 76). However, there is a new white paper (Ferguson, 2011), tailored to small projects, that may give some hope to PRINCE2 application. Whether or not all of Allen's advice can be applicable to a small project, her book addresses the issue of project management within the LIS field, and is valuable in that respect.

A more recent book (Carpenter, 2011) does the same thing in a slightly different way. Carpenter differentiates the PRINCE2 "process model" as being more flexible than a "project cycle management" approach (p. 8-10). Processes can be iterative and disjointed and a smooth flow from one section of the life cycle to another does not account for that complexity. She opens the field to archives and museums and covers many of the same topics as Allen (often quoting her). However, Carpenter's coverage of ICT use in project management is deeper. "It is inconceivable now," she writes, "to think of any project manager in libraries, archives or museums operating without using some form of ICT." She further outlines two possible approaches with ICT,

not exclusive but dependent in large part upon the size and complexity of the project and the IT competence and know-how of the key players, including the project manager. The first is to adopt a whole project management solution and use a project management application with a range of different functions. The second is to take a more task-oriented approach and use specialist applications to address discrete tasks in project management (p. 182)

Winston & Hoffman (2005) detail the history of project management beginning with the work of Frederick Taylor, through private sector and information technology companies (p. 53-54), and finally to libraries. "It is important to note," they write, "that in support and documentation of work in libraries, there has been limited provision of information related to project management in libraries in the LIS literature" (p. 52). Their study, which focuses on the inclusion of project management curricula in library and information science programs, concludes that the level of management curricula in general varies widely, but that "it is necessary to address issues of project management" (p. 60).

Another article, which approaches the need in a different way, offers a literature review and a study of job ads to "determine whether project management skills are in demand for librarians" (Kinkus, 2007, p. 358). Kinkus determines that "project management in libraries is here to stay" (p. 361). She points librarians toward associations for publications such as the ARL October 2005 SPEC Kit, *Managing Large Projects*, and for training opportunities (p. 361). If project management is not available in an MLS/MLIS curriculum, she recommends cross-registering in a field that does offer training (p. 361-362). However, if one graduated from a program that did not offer training, a training budget is not available, and that on-the-job need looms large, what shall one do?

Richard Hammond recommends at least a look at a wiki as a communication tool for project management. Hammond quotes Ken Liu, CEO of MindTouch, when he writes "because wikis do not require a lot of upfront IT support ... 'the cost of failure is actually very low'" (p. 31). Hammond implies he wishes to shift the focus from the technology to the people who are using it. A company that provides "unique solutions" must harness people power using "open, self-organizing communications" (p. 33).

The literature is successful in describing the need for project management in libraries; library workers need to manage multiple projects, large and small, whether or not they have received training in their LIS curricula. However, the literature offers no easy panacea to the gap, no real "one-size-fits-all" solution, and few examples of project management solutions applied to library projects, especially small ones.

Project Life Cycle Analysis

The Southeast Kansas Farm History Oral History Project (<http://axedigital.pittstate.edu/cdm-sekfarm/index.html>) is a joint effort between Axe Library Special Collections, the Southeast Kansas Farm History Center (SEKFHC), and the Parsons Public Library (PPL). The initial SEKFHC project (August 2008-October 2009) was supported by a Kansas Humanities Council grant. It consisted of interviews

documenting “The Impact of the New Deal on Southeast Kansas Farm Life.” PPL added excerpts of the interviews to their web page, and archived and cataloged the transcripts for public access. The “second phase” of the project is a largely volunteer effort led by SEKFHC to continue to collect interviews from older residents who lived on a farm in Southeast Kansas, in order to preserve their stories before they are lost. Axe Library participation entails publication on the web of both phases of the project using CONTENTdm software. Aspects of the project that are totally new to the Axe Digital program include the use of sound files in CONTENTdm, and collaboration with institutions outside the university. Because Axe Library already licenses the software, there was no immediate budget to consider outside of the time spent by Axe Library staff, and although the project was a priority, there was no definite time frame. The project was accomplished concurrently with other Axe staff duties. As with other projects, no project management tool was used.

This section of the study will review the project life cycle of the Axe Library CONTENTdm publication of the SEKFHC Oral History Project. It does not provide a review of the software. The project life cycle was reconstructed as much as possible from e-mail and file change dates, and entered into a trial version of a web-based project management software. The software default requires that data be input in four categories: identification; design; implementation; and evaluation. Steps identified from the data include:

Identification

1. Informal query from PPL about possibility of project (months before no. 2)
2. E-mail reminding Axe Library personnel about query (May 26, 2010)
3. Research with Dean, Special Collections Director, at Axe about feasibility of project (June 2010)
4. Formal meeting with all three parties: Axe, SEKFHC, PPL at Parsons (July 27, 2010)

Design

5. Design of written agreement (Aug. 1-Sept. 6, 2010)
6. Board approval of agreement SEKFHC (Oct. 1-Oct. 25, 2010)
7. Agreement signed (between Oct. 25 and Dec. 6, 2010)

Implementation

8. Files transferred from SEKFHC to Axe (between Dec. 6, 2010 and Apr. 18, 2011)
9. Convert server to handle audio files (April 2011)
10. Initial draft webpage (April 2011)
11. Website customized (Summer 2011)
12. Files converted and loaded into CONTENTdm (July 6-July 25, 2011)
13. Missing file (Aug. 2-8, 2011)
14. Web page released to SEKFHC and PPL (Aug. 1, 2011)
15. Press release drafted and sent to SEKFHC for input (Nov. 2011)

Evaluation

16. CULS Paper

These are the big steps. There were many e-mails & informal meetings between Axe Library participants as the project got underway. Axe Library participants were:

David Nance (Systems, 3rd floor): server and site customization to produce website, sound files & transcript display

Morgan McCune (Cataloging, 1st floor): file load to CONTENTdm, metadata

Randy Roberts (Special Collections, basement): dept. owns the project at Axe, draft agreement

David Bunnell (Dean, 1st floor): project approval

Since many of the tasks ran concurrently, the project can also be visualized in a GANTT chart (Allan, 2004, p. 48-49):

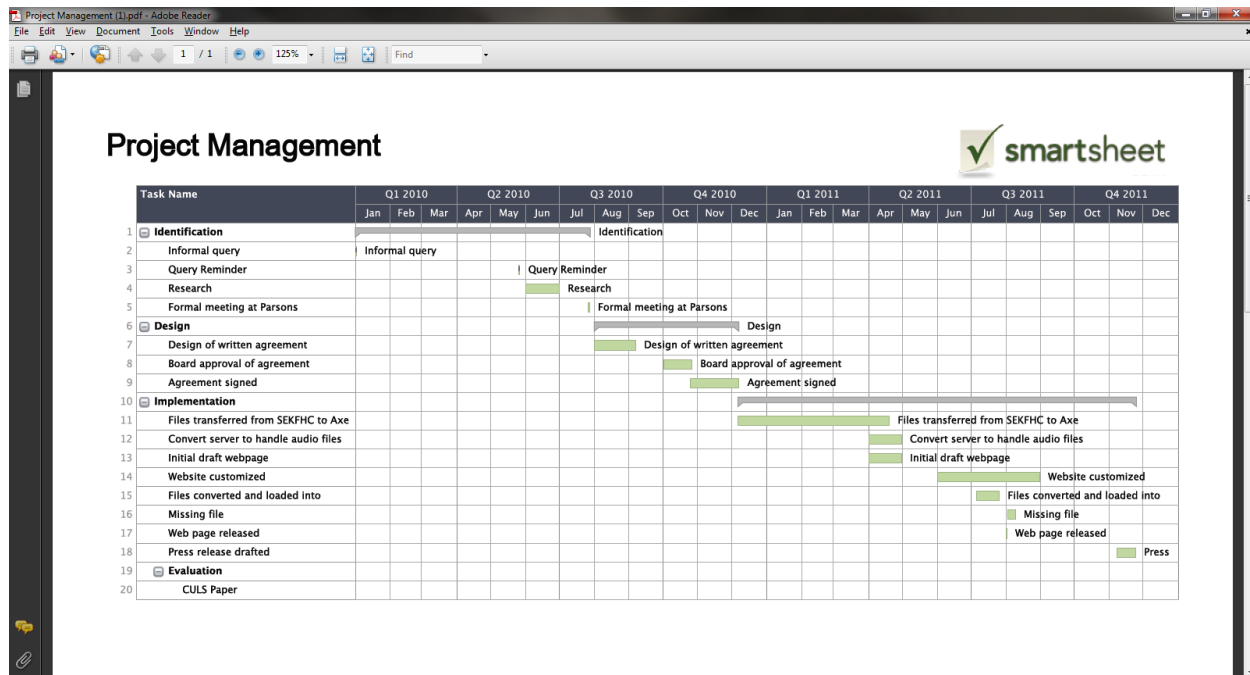


Chart 1: GANTT chart created with trial version of Smartsheet (www.smartsheet.com)

The simple act of reconstructing the steps and creating a chart illuminate several points, although they might not all be obvious to an outsider to the project.

- Reconstruction of the project is not an optimum way to approach the exercise. It would be far more efficient to place a chart where all participants can chart their steps accurately. If the chart is completed by participants involved in each step, time spent charting would be negligible.
- The identification phase of the project is artificially long since so much time elapsed between the first suggestion of the project and the project initiation. Some kind of project tracking software might help participants put the ball in motion more quickly when an informal query is put forward.
- Retrieving the missing file took a week. If the missing information had been identified before the files were converted, the acquisition of the new file could have taken place while other files were in processing, abbreviating the file handling time. Checking for errors in file transfer should be part of the file acceptance step, not part of the loading step.

Another important issue that is not obvious from the chart, even to a participant, is the time spent "regrouping." When a group of multitasking participants from different areas (even library floors) works on a project together without a central place for ongoing communication on the project, several meetings are spent revisiting the project mission, the process steps, or other aspects of the project. A centralized communication software, capable of handling documents, with at least a section dedicated to the specific project, could help reduce overall project time.

Regarding the evaluation phase of the life cycle, this chart and analysis has been useful and well worth the effort. If nothing else, it provides a history of the project that would have otherwise been lost in e-mail archives. The dated list of steps, whether it is represented in text or a chart can provide:

- a visual to help identify time-drains and other issues, either during or after the project.
- a baseline against which to compare other projects.
- an example that can inform future partnerships and collaborative efforts.
- a basic reporting structure that can help managers know where the project is in its life cycle.

More evaluation will follow, including evaluation of the product itself before future phases are implemented. There is need for more research at Axe Library to identify the best ways to manage projects. Considering the literature, there is room for more published research, especially on practical applications of project management tools in the library and information services field. We know it's important to "put up" these stories before they are lost; it is also important to understand our procedures and processes before they are lost, so that we may improve and learn from them.

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Morgan O.H. McCune is the Cataloging Librarian, Axe Library, Pittsburg State University, Pittsburg, Kansas.