Closing the Loop: Project Assessment and Leveraging Goals for Future Planning

Ellen Ryan, M.A., M.L.I.S.
Schedule for this webinar

- Process of project goals and assessment
- Determining useful metrics for a project
- Sharing methods for tracking metrics, progress, and time
- Adapting to project roadblocks
- Defining and celebrating project success
- Setting new goals for future projects
Objectives

• Know how to set measurable goals and determine project success
• Have the tools needed to track project progress
• Be able to communicate goals and outcomes with various audiences
• Feel confident about project progress, even when things don’t go as planned
Project Goals and Assessment

Four cornerstones of a project goal:

• Time
• Target
• Budget
• So What?
Project Goals and Assessment

Stick to your goals!
Project Assessment

Downward spiral can lead to:

- Poor quality
- Inefficiency
- Late delivery
- Poor predictability
Discussion

What are some problems you have encountered when working on projects?
Discussion

What are some problems you have encountered when working on projects?

The group spent 5 minutes discussing this question. A complete transcript of Chat 1, Signs of Trouble, can be downloaded on the webinar’s home page found in the text below.
Signs of trouble

- Broad scope
- Failure to meet user needs
- Lack of re-engineering and re-definition of job roles and responsibilities
- Lack of clear goals
- Too many leaders
- Too much reliance on outside consultants
- Lack of contingency plan
- Inadequate testing
- Inadequate user training
- Denial that the project is in trouble
Determining useful metrics
Useful metrics for project management

- Productivity
- Scope of work
- Quality and satisfaction
- Cost
- Gross Margin
Discussion

What are some ways your project will help contribute to your organization’s increased profits?
Discussion

What are some ways your project will help contribute to your organization’s increased profits?

The group spent 5 minutes discussing this question. A complete transcript of Chat 2, Project ROI, can be downloaded on the webinar’s home page found in the text below.

Made possible through the generous support of The Andrew W. Mellon Foundation.
Implementing project metrics

Metrics = Action
Metrics for long-term value

- Better control
- Better odds for success
- Insight for future projects
- Build historical data
<table>
<thead>
<tr>
<th>Institution</th>
<th>Collection(s)</th>
<th>No. Item</th>
<th>No. File(s)</th>
<th>Digitized</th>
<th>Transcribed</th>
<th>Tran. Check</th>
<th>Metadata</th>
<th>Checked</th>
<th>Uploaded</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mary Ann Craig (Posey) Papers (1830-1875)</td>
<td>1</td>
<td>2</td>
<td>6/25/2012</td>
<td>5/22/2012</td>
<td>8/28/2012</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sardins Smith Diaries, 1862-1863</td>
<td>0</td>
<td>0</td>
<td>6/26/2012</td>
<td>8/28/2012</td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Philip Whelshimer Papers (1826-1900)</td>
<td>29</td>
<td>56</td>
<td>6/26/2012</td>
<td>11/16/2012</td>
<td>11/9/2012</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Daniel Lindly Miles (1827-1862) Papers (7)</td>
<td>2</td>
<td>12</td>
<td>6/27/2012</td>
<td>10/30/2012</td>
<td>11/9/2012</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Andrew (Civil War soldier)</td>
<td>1</td>
<td>2</td>
<td>6/27/2012</td>
<td>10/30/2012</td>
<td>11/9/2012</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>James Swales</td>
<td>11</td>
<td>35</td>
<td>6/28/2012</td>
<td>10/30/2012</td>
<td>11/9/2012</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Jeremiah Butcher</td>
<td>2</td>
<td>6</td>
<td>6/28/2012</td>
<td>10/30/2012</td>
<td>11/9/2012</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cape River Heritage</td>
<td>Oliver Collection (Soldier’s Handbook)</td>
<td>1</td>
<td>34</td>
<td>10/1/2012</td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Photo, Red Rover</td>
<td>1</td>
<td>1</td>
<td>9/21/2012</td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ledger</td>
<td>1</td>
<td>52</td>
<td>10/1/2012</td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Gantt Charts

• Visual tool
• Display project schedules
• List project activities with start and end dates
PERT Charts

- Schedule
- Organize
- Coordinate tasks
CPM chart

- Fixed time estimates
- Analyze cost/time tradeoffs
PERT and CPM

• Schedule
• Budget
• Resources
• Time constraints
Six steps common to PERT and CPM

1. Define the project and prepare the work breakdown structure
2. Develop relationships among the activities
3. Draw the network connecting all of the activities
4. Assign the time and/or cost estimates to each activity
5. Compute the longest time path through the network (critical path)
6. Use the network to plan, schedule, monitor, and control the project
Adapting to roadblocks
Adapting to roadblocks

1. Ad hoc process
2. Structured and clear review process
Change can lead to conflict

1. Ideological conflict
2. Nonproductive conflict
Unexpected projects

Special Collections and Archives, Eli M. Oboler Library, Idaho State University
Discussion

What, if any, roadblocks have you encountered when working on projects?
How did you deal with them?
How do you deal with change?
Discussion

What, if any, roadblocks have you encountered when working on projects?
How did you deal with them?
How do you deal with change?

The group spent 8 minutes discussing this question. A complete transcript of Chat 3, Roadblocks, can be downloaded on the webinar’s home page found in the text below.

Made possible through the generous support of The Andrew W. Mellon Foundation.
Defining & celebrating project success
Defining and celebrating project success

- Realistic and definite goals
- Client satisfaction
- Profitability
- Market or service availability
- Implementation process
- Perceived value of project
- Communication
- Teamwork
Discussion

Does anyone else have ideas about celebrating project success?
How would you celebrate?
Discussion

Does anyone else have ideas about celebrating project success? How would you celebrate?

The group spent 6 minutes discussing this question. A complete transcript of Chat 4, Celebration, can be downloaded on the webinar’s home page found in the text below.
Defining and celebrating project success

- Thank you notes
- Reception
- Outing
- Flowers
- Awards ceremony
- Press release
- Lecture
- Exhibit
- Time off
Setting new goals built on previous projects

• What went wrong?
• What went right?
• What could have been better?
Common mistakes

• Too busy to evaluate projects once they’ve finished
• Moving on to the next project before taking the time to review the one you have just finished
• Failure to learn the lessons of past projects
• Not making those lessons learned available to other members of the organization
Questions, answers, and feedback

Thank You!

Ellen M. Ryan
ryanelle@isu.edu