Project Lifecycle Process

MIT Libraries
All-Staff Meetings
November 4 & 5, 2010
Keith Glavash, AD for Administration

MITLibraries

Why do we need this process?

- The new library organizational structure needs a way to move new ideas from conception through implementation

- MIT Libraries have a strong desire to support good ideas when they align with our strategic directions and are affordable

Goals of the new process

- Advance worthy projects
- Clear and relatively simple process
- Transparency
- Equal access
- Encourage initiative and creativity

Project Review Committee

- Nicole Hennig (2 yrs)

- Marlene Manoff, convener (3 yrs)

- Christine Quirion (3 yrs)

- Rich Wenger (2 yrs)

- Barbara Williams (3 yrs)

New members rotated as terms are completed

Certainty vs. Risk

- MIT Libraries value experimentation and creativity

- Limiting projects to "sure bets" conflicts with the MIT culture of measured risk-taking

- Best ideas will flow from an environment and process which encourage both pragmatic problem solving and "out-of-the-box" thinking

What's OUT of scope?

- "Large" space projects which normally require Institute approval and funding
- "Large" system-wide projects whose scale, impact and costs require very wide involvement and support (e.g. new ILS, new organizational structure ☺)
- Very small "local projects" which don't have significant staffing or out-of-pocket cost requirements
- Capital equipment purchases which do not represent a new service, collection or capability

What's IN scope?

Factors include…

- Some extent of involvement beyond originating unit/department

- Staffing level and nature of the work

- Direct costs

- Project Leader & Sponsor

Not limited to "technology" projects

IDEA

Action Librarian

Pre-Proposal

Full Proposal
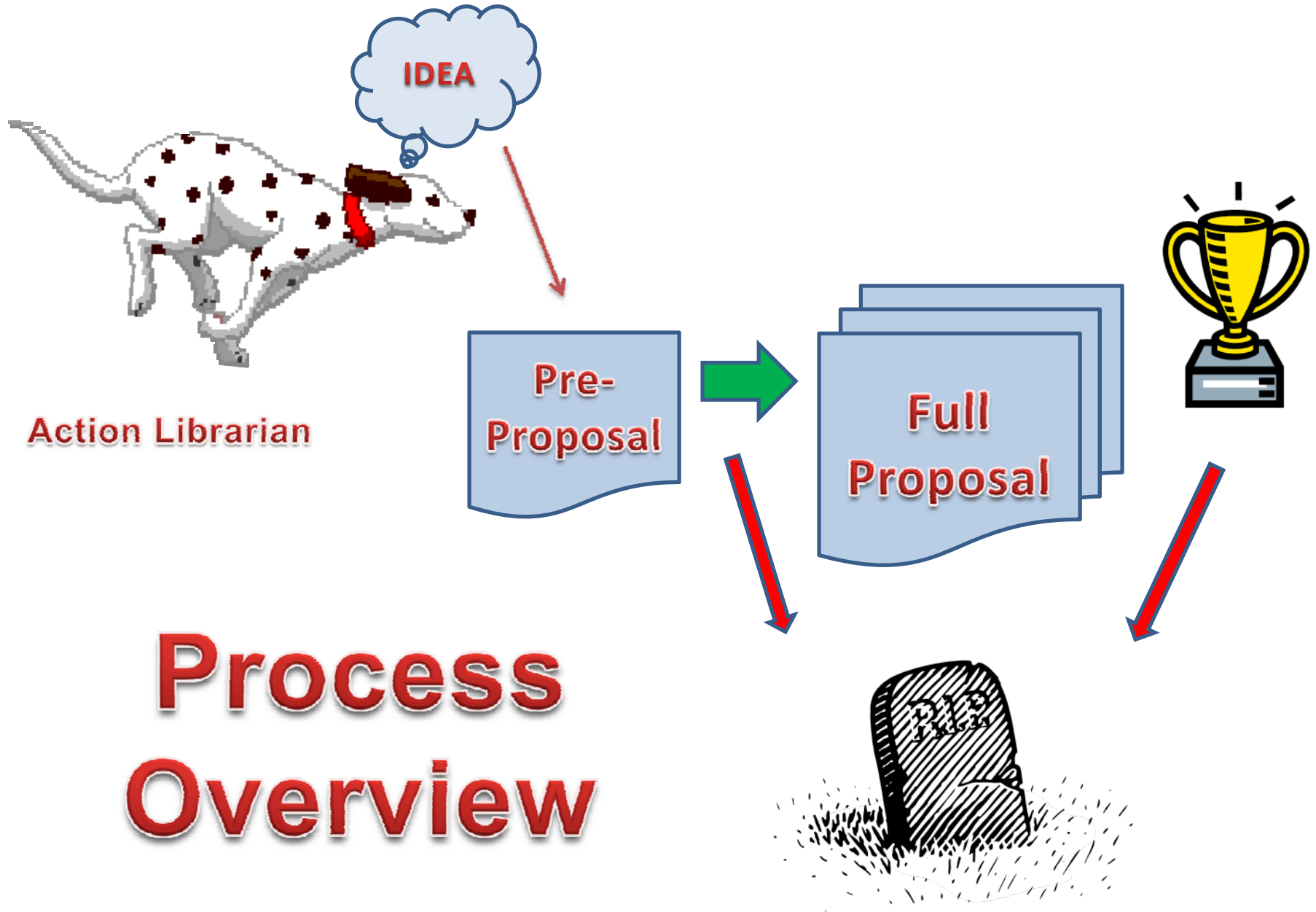
Process Overview

Defining a Project – 1

- **REQUIRED FEATURE**
  - <u>More than one unit/department</u> – Project will need collaboration and participation with groups or individuals beyond the originating unit/dept

- **AT LEAST ONE OF THE FOLLOWING FEATURES**
  - <u>Staff time</u> - Significant amount outside the normal work of the affected staff in their unit(s) (e.g. equivalent of at least one full-time person for one month)
  - <u>Costs</u> - Out-of-pocket costs estimated to be beyond what can be supported by existing local or central budget lines

Defining a Project – 2

- **Leader/Project Manager**
  - ALL project PRE-PROPOSALS are required to identify a potential leader/manager
  - This role is filled by a specific person, but need not be full time

- **Sponsor**
  - FULL PROPOSALS also need to identify a sponsor at the department head or associate director level to support and advocate for the project

Process steps - 1

1. A GOOD IDEA!

2. Pre-proposal (1-2 pages, template format) submitted to Project Review Committee

   a) Basic concept and proposed project leader

   b) Anything that's known about required resources, outcomes, impact

3. Approved pre-proposals expanded to full proposals (template format) with the assistance of Expert Advisors, as needed

Process steps - 2

4. Full proposals submitted to the Project Review Committee, including these elements:

- Description and justification of need/strategy
- Budget and staffing resources required
- Identified leader and sponsor
- Timeline
- Project and assessments plans

5. If approved by Project Review Committee, forwarded to Steering Committee for final review and funding prioritization

Expert Advisors - 1

- Rights assessment/copyright (Ellen Duranceau)
- Budget planning (Keith Glavash)
- User interface design (Darcy Duke)
- Assessment planning (Lisa Horowitz)
- Software analysis/develpmt (Richard Rodgers)
- IT infrastructure (Alex Brennen & Pam Nicholas)
- Foundation & other funding options (Steven Horsch)

Expert Advisors - 2

- Archives/Records Management (Tom Rosko)
- Project planning/vendor ID (Beverly Turner)
- Metadata schema (Rob Wolfe)
- Images, audio/video, GIS, CAD, statistical data, etc. (Specialized Content & Services Staff)

Also any other staff who are knowledgeable in the specific parameters of a given proposal

Budget

$100,000 in direct costs for FY11

Divided any number of ways, depending on the proposals

Alternative Funding

- Some ideas may make sense to propose to external funding sources, like foundations or government agencies.
- Process intended to help leverage such possibilities as well as introduce more staff to the realm of developing grant proposals.

Cost of Staff Time

- Staffing is our largest expense; every hour spent on a project represents a diversion of that resource from one activity to another, often with impacts on other staff and units

- The average cost of a librarian devoted 100% to a project for one month is about $6K

- Important to keep in mind the consequences of substantial staffing requirements

- Projects can also represent interesting and rewarding activities for staff

Sustainability

What type of project is this?

- One-time project to fix or improve something that already exists and deserves to continue to be sustained

- Or is it a project to implement something new that, if successful, will need to be sustained

High-level Strategy

- How does this project support the Libraries' strategic priorities?

- Who are the direct and indirect beneficiaries of this project?

- Are there collaboration possibilities within the Libraries, MIT, or outside organizations?

When can I submit a pre-proposal?

- Templates for pre-proposals and proposals must first be developed
- Criteria and evaluation method must be developed
- Project Review Committee will message all-lib when they're ready to begin receiving your ideas
- projectreview-lib@mit.edu

Questions?