

# The Hard Task of Soft Skills: Project Management for the Materials Review Process

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# Overview

- Before project management
- Why project management?
- The good, the bad, and the complicated
- Recommendations

# Backstory: Serials Review 2017

## SRP17 Summary of Process Recommendations:

- A Project Manager is needed to:
  - coordinate communications
  - avoid duplication of effort
  - monitor timelines
  - ensure reliable data and financial information
  - ensure staff have appropriate time to complete tasks
  - clearly define project goals and targets
- State priorities for project clearly
- State our projected cut target or target scenarios
- Determine the scope of materials to be reviewed
- Examine and decide on metrics to be employed

# More Backstory: Serials Review 2017

- Scope
- Target
- Communication
- Decision-making
- Documentation
- Feedback
- Deadlines

# How Did We Get Involved?

- Leadership changes
- Establish trust
- Accountability



# TRLN Project Management Resources

- Group formed in 2017
- Developed PM Toolkit
- Led PM Training in 2018

# What went well?

- Improved support and organization
- Opportunity to use project charter
- Helped with accountability
- Provided a buffer between/among stakeholders
- File corruption ceased to be a problem
- Planner used for the first time
- Assessment/post-mortem

# What was difficult?

- Communication challenges 2018 vs. 2019
- Charter challenges 2018 vs. 2019



# What was also difficult?

- Defining scope
  - Purpose and goals of the review
  - Dynamic budgets
  - Confusion over timelines

# More Difficulties?

- Roles and responsibilities
- Leadership changes
- Staffing and capacity concerns

# Yes, more difficulties!

- Consensus on data needs
- Data collection
- Vendor data

# What happens in MRP20?

- Strategy, strategy, strategy

# Recommendations

- Develop a culture of project management
  - Buy-in from leadership
  - Training for all staff
  - Be empowered to lead others via these principles and tools
- Shared understanding of the project goals
  - Use the charter
  - Refer to the charter
  - Check-in on team progress -- using the charter



# Some more unsolicited advice

- Do implement project management processes iteratively
  - Don't get discouraged if there are starts and stops
- Do get to know your stakeholders
  - Don't assume that everyone has the same goals
- Do have a clear decision-maker
  - Don't be afraid to ask them to intervene

# Thank You!

Questions, comments, thoughts? Contact us:  
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