Using Project Charts to Plan, Manage, and Assess Library Initiatives

**Library Assessment Conference**
*Charlottesville, Virginia*
*October 29-31, 2012*

**Project Chart Process**

- **Identify Activities**
- **Get Buy-In**
- **Establish Deadlines & Priorities**
- **Assess Progress**

**Planning**
- Identify what you plan to accomplish
- Identify who will take the lead
- Identify when the project needs to start/end
- Identify the priority in relation to other activities

**Assessing**
- What is the status?
- Given the project status & workloads, should we reconsider the lead person?
- Is the timeline still realistic? Does it need to be adjusted?
- Has the priority level of the project changed?

**Library-Wide Project Chart**
- Chart used for library-wide projects
- Broader in scope
- Steps are less detailed

**Tech Services Project Chart**
- Chart used for Tech Services projects
- Deals with unit-specific activities
- More detailed steps that relate to workflow
- Determining action steps and timeline indicates who takes the lead

**Feedback about the Charts:**
- "Knowing who’s working on what changes my expectations of their availability and helps me determine the relative priority of my own projects."
- "Helps us as a faculty think about priorities and continuing needs of the library [in a big picture way]."

**Benefits of using the project charts:**
- Inexpensive & Flexible
- Easy to use to report deliverables
- Helps to more clearly express priorities

**Challenges in using the project charts:**
- Establishing priorities and deadlines
- Establishing lead person or group
- Transparency

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