

**Sprinting towards Faculty Engagement:**

**Adopting Project Management Approaches to Build Library-Faculty Relationships**

Pamella R. Lach, San Diego State University Library & Information Access

Brian Rosenblum, University of Kansas Libraries

## ABSTRACT

*Purpose – In the spring of 2016, the University of Kansas Libraries piloted Research Sprints: One Week, One Project, a program aimed at cultivating relationships with faculty through deep project-based engagement.*

*Methodology/approach – Three faculty members, matched with a team of library experts, worked intensively to complete a research or pedagogic project for one week in May. Critical to the program's success was the use of project management methodologies and tools. These tools were essential to identifying task dependencies, developing workflows, and documenting work processes.*

*Findings – The overall success of the Sprints demonstrated to faculty that library staff can be more than one-shot consultants; faculty collaborators learned first-hand that the library can be a true partner throughout the scholarly process. As an approach to user engagement, Sprints pose some considerations for library management, including the need for robust staff training in project management and teambuilding, internal resistance to utilizing project management tools, difficulty finding staff time and resources to commit for a short but high-concentrated period, and the need to align projects with staff expertise and availability.*

*Originality/value – This chapter provides an assessment of the Sprints pilot, addressing some of the implications, potential benefits, and challenges of adopting and adapting Research Sprints to support library work. It will be of interest to project managers and library staff who are considering integrating project management methods into their outreach and services, and provides examples of how project management can inform library efforts to more deeply collaborate in advancing the scholarly work of local research and teaching communities.*

**Keywords:** Project Management, Faculty Engagement, Library Services, Digital Humanities

## INTRODUCTION

In the spring of 2016, the University of Kansas Libraries (KU Libraries) piloted *Research Sprints: One Week, One Project*, a new program aimed at cultivating relationships with faculty through deep project-based engagement. Three faculty members, each matched with a team of expert librarians and staff members, worked intensively and without distractions for one week in May. All three teams succeeded in producing impressive digital deliverables, and all three faculty members reported that the week had exceeded their expectations. Critical to the success of the program was the use of project management methodologies and tools, which were

developed in-house and informed by best practices in project management and digital humanities. Each team had an assigned project manager and a set of project management tools and templates to stay focused and on track. An additional layer of structure was built in to support the project managers in their roles.

This chapter provides an assessment of the pilot program, addressing some of the implications, potential benefits, and challenges of adopting and adapting the Research Sprints model to support internal library work and faculty engagement. Whether a library is contemplating launching a similar engagement project, or just considering the adoption of project management processes, this pilot demonstrates the value of relying on project management methods to structure work, as well as to demonstrate the library's contributions to the communities it supports.

## **RATIONALE OF RESEARCH SPRINTS**

### *Deepening Librarian-Faculty Partnerships*

The genesis of the pilot was grounded in improving engagement with local user populations, which begins with transforming users' attitudes towards librarians. Shifting teaching and research faculty's perception of academic librarians was a driving force in the development and strengthening of library liaison programs (Bales, 2015). Christiansen, Stompler and Thaxton (2004) observed an "asymmetrical disconnection" (p. 116) between faculty and librarians, stemming, in part, from gender gaps, divergent domain expertise, organizational structures, the service orientation of libraries, and uneven status and power dynamics within and across institutions. Eva (2015), for example, insists that "Academic librarians would also do better at making themselves visible as academics" (p. 27). Meulemans and Carr (2013) call for the development of "genuine partnerships" (p. 82) to create "meaningful collaboration" between

faculty and librarians. They note the need to transform faculty members' perception of the library from that of merely a service provider, and urge librarians to move beyond a service-based, customer-driven approach in which librarians are "at the service of faculty," (p. 81) in order to address the "uneven relationship" between the two (p. 83). Though compelling, they limit their argument to instructional support (Cassidy and Hendrickson, 2013) and partnerships in teaching the research process. The importance of and challenges to developing library-faculty partnerships are similarly emphasized in digital humanities literature (Muñoz, 2012; Shirazi, 2014; Vandegrift and Varner, 2013).

Rentfrow (2008) calls for reforming the library profession, from graduate training to hiring practices, in order to shift faculty perceptions of librarians. "Faculty, to my mind, are the single greatest challenge facing the modern research and academic library," she writes. "Without faculty support and understanding and without their regular collaboration with librarians, the research library will not survive. It may remain as an interesting museum piece or storage facility, but it will no longer be the heart of the institution" (p. 60). Rentfrow suggests that strong collaborations with faculty—built on mutual respect, reforming MLS programs, and diversifying librarianship—can ensure the continued relevance of the academic library. The same can be said of public libraries and school media programs. Partnerships with primary user groups are critical to maintaining a library's relevance within its communities.

### *The Idea of Research Sprints*

Aware of these challenges, members of the Center for Faculty and Staff Outreach and Engagement ("Faculty Center"), one of several user-based outreach groups in the Research & Learning Division at KU Libraries, collaborated during the 2015-2016 academic year to develop new models for supporting campus faculty. The idea for the Research Sprints (hereafter referred

to as the Sprints) emerged out of visioning work to imagine new ways of engaging with users. The Faculty Center was particularly interested in developing ways to support faculty research throughout the entire scholarly lifecycle, rather than just at the beginning and conclusion of a research project. Part of this entailed shifting users' perceptions of library expertise (Wolff, Rod, & Schonfeld, 2016), as well as shifting librarians' self-perceptions (*Library Journal Research*, 2015).

The goal in piloting the Sprints was two-fold. First, to develop a new type of user engagement based on meaningful, mutually-beneficial (Koltay, Lyons, Mericle, & Steinhart, 2016), and equitable scholarly partnerships. The authors (hereafter referred to as the Sprint coordinators) envisioned this as a way to strengthen relationships with the faculty and build new partnership pathways by demonstrating and applying library expertise as scholars, researchers, information specialists, technicians, and project managers. Second, and interconnected to the first goal, the Sprints would demonstrate the value of KU Libraries as more than a space or set of services for advancing faculty research. Accomplishing this would require a user-centered approach to meet users' needs effectively (Rockenbach, Ruttenberg, & Tancheva, 2015, pp. 11-18). In short, the Sprints proposed a model of user engagement rooted in deeply-seated relationships cultivated initially around a single project, but branching out in new directions over time. This model contrasts with the more standard type of user engagement in academic libraries—the just-in-time, one-on-one research or teaching consultation.

The model of the Sprints, while perhaps new to academic libraries, has been growing in popularity in other domains, such as software development scrums ([www.scrumguides.org/](http://www.scrumguides.org/)), and in the digital humanities (DH). The NEH-funded *One Week / One Tool* program, launched in 2010 at George Mason University's Roy Rosenzweig Center for History and New Media, was

inspired by “models of rapid community development” ([oneweekonetool.org](http://oneweekonetool.org)) and brought together teams to brainstorm, build, and promote a full digital project in a one-week span. Since then, other DH projects have experimented with design sprints, such as *Six Degrees of Francis Bacon* (Ladd, 2017).

### *Using a Project Management Approach*

The Sprint coordinators designed the Sprints pilot with project management approaches, methodologies, and tools in mind. As Lynne Siemens (2016) demonstrates, project management methods provide important tools for managing digital projects. Project management, she writes, “can help manage common issues such as project risks, unanticipated obstacles and tasks, team member turnover, and timelines, limit scope creep and budget overspending,” among other benefits (p. 343). Given the project-centered nature of the Sprints, project management approaches were a natural fit. Project management methodologies are applicable regardless of the length of the project lifecycle; even a highly-accelerated and compressed lifecycle such as the Sprints could benefit from project management. Likewise, project management best practices proved to be a helpful tool for planning the overall pilot. Backwards design helped the Sprint coordinators identify tasks and their dependencies, deliverables and milestones, and critical non-flexible deadlines. Adopting project management approaches created a successful structure that can be adapted to other types of library projects, whether outward-facing projects intended to support user engagement, or internal projects aimed at improving systems and workflows. The remainder of this chapter focuses primarily on the project management approach to designing and implementing the Sprints.

## **DEVELOPING THE PILOT: GETTING READY TO SPRINT**

### *Building Buy-In: Developing and Promoting the Sprints*

In early 2016 the Sprint coordinators began designing the pilot program with an anticipated launch in mid-May, after the spring semester but before summer session began. They used a backwards design approach to develop a timeline to ensure all pre-Sprints setup tasks would be completed by mid-May. They developed a draft Call for Proposals (CFP) and circulated it for comment among internal stakeholders, including Division Heads and librarians who might be likely to participate, as a way to build internal buy-in and generate excitement. Administrative buy-in was crucial because it was clear from the start that the Sprints would require a significant commitment of time and energy by library staff. Assistant deans were thus consulted early in the process and from the beginning expressed support and enthusiasm, with the caveat that staff time would have to be negotiated for specific projects before a firm commitment could be made. One assistant dean offered to provide some small monetary support—up to \$500 per project—for any costs associated with the projects (e.g. for software or other supplies). This offer was included in the CFP though in the end none of the pilot projects asked for this funding. A portion of this funding was used to pay for food and supplies.

Once the CFP was ready in early March 2016 (see Appendix A), the Sprint coordinators began promoting it through social media, the KU Libraries website, emails to faculty contacts, and through word-of-mouth. The month-long open application period featured an information session, which provided an overview of the program's vision and goals, walked attendees through the application, and invited faculty to discuss their project ideas with each other. Ten faculty, each from a different humanities, social science, or physical science discipline,

expressed some level of interest, either by attending the information session, meeting one-on-one with one of the coordinators, or by submitting an application.

### *Selecting Projects and Participants*

Six faculty applied for the Sprints, and three were accepted (50% acceptance rate). The Sprint coordinators evaluated the six applications based on three criteria. First, *feasibility*, as defined by a project appropriately scoped and scaled for completion in one week. Second, *impact* of the project on the faculty member's research or teaching. And third, faculty members' *rationale* for wanting to partner with KU Libraries to accomplish their project. The coordinators reserved the right to decline a proposal if there appeared to be a lack of library expertise and capacity to support it.

Since it was a pilot and faculty interests could not be predicted, the Sprint coordinators opted not to create a formal selection committee. Rather, the coordinators conducted the first review of proposals, eliminating two applications because of scope or a mismatch between the project and available library expertise. Using an abbreviated backwards design approach, they determined the specific domain knowledge needed for the remaining projects, established the broad tasks each project would require, and generated a list of functional skillsets to complete the project. They then matched the domain expertise and known or perceived skillsets of colleagues to each project to identify potential team members, in several cases identifying staff who could work on multiple projects.

Colleagues who had been identified as potential team members were then asked to review the projects to which they had been tentatively assigned, and indicate whether they would be willing to join the team (and, if they were listed as a member on more than one project team, to indicate their preference). Based on the responses, one additional application was eliminated

because a team could not be formed. This left three viable projects, all of which were accepted. Sprint team members were drawn from three units across KU Libraries: the Research & Learning Division, Content & Access Services Division, and the Digital Initiatives & Discovery Services Division. Eleven library participants, including the two Sprint coordinators, directly contributed to the pilot program. Library team members included outreach librarians and staff members, a GIS specialist, a content development librarian, and a data services librarian. An additional staff member from a fourth library unit, the Office of Communication & Advancement, photographed the week for future documentation and promotional purposes.

The selected projects represented a range of project types and disciplines. One was exclusively research based. The other two were pedagogically focused. All three were digitally-centered, seeking to create tangible digital deliverables that could be openly shared. One project proposed to create an interactive and multi-layered digital map for a mobile app about a contested event in Civil Rights history. Another project wanted to create an online physical sciences laboratory for non-science majors, to be offered as a one-credit add-on to an introductory science course. The third project sought to create an open syllabus and set of resources on gamification; the course scaffold would be adaptable to classes across the disciplines.

## **PROJECT MANAGEMENT APPROACHES, TOOLS, AND METHODS**

Once the CFP had been distributed, and during the application review process, the Sprint coordinators began developing the structure for the week, focusing in particular on three interrelated elements: working space and interaction between the teams, project management templates and tools, and roles and responsibilities for each team's project manager.

### *Work Structure and Team Interaction*

While the three teams would work independently of each other, the Sprint coordinators also wanted to create a greater sense of coherency for the pilot through team cross-over and comingling. The coordinators hoped to build in opportunities for individual teams to problem solve with fresh perspectives. To that end, the week included an opening breakfast event (with funding support from Libraries administration) in which participants could review the overall goals and responsibilities for the week. Faculty Principal Investigators (PIs) introduced their projects, and librarian team members discussed their anticipated roles. An informal concluding lunch was also planned for the Sprints week to facilitate a closed discussion and reflection among participants; during the actual week the lunch was re-conceptualized into an informal and semi-public event. Finally, informal and unstructured team “visitations” were encouraged throughout the week, to provide a break from team members’ own projects, and to learn about what other teams were doing. Only one team actually engaged in a visitation, although the Sprint coordinators spent time with each team throughout the week. Faculty and librarians alike recommended that future Sprints include more time for socializing; informal daily breakfasts or midday coffee breaks, or a cocktail hour at the end of the day, seemed the most feasible and least disruptive. As discussed below, additional layers of structure and support were developed for each team’s project manager.

### *Templates and Tools*

Essential to the success of the week was the use of project management tools created specifically for the Sprints. Both coordinators have enjoyed a range of project management training (Berkun, 2008, FranklinCovey) and experience, which guided the overall approach and informed the design of the Sprints templates (see Appendix B).

The *Project Scope Template* served as the primary guiding document, distilling and outlining the overall project goals and expectations. In addition to basic information (team contact information and faculty details), the template included 1) Brief Project Description; 2) Goals (as stated in proposal); 3) Team Roles, including Faculty PI, Project Manager, and additional members, as specified by particular project needs; 4) Requirements, including the needs identified in the proposal and any additional needs subsequently identified; 5) Out of Scope; and 6) Deliverables. The intention was for the team to finalize the document in advance of the start of the Sprints, under the direction and leadership of the project manager.

The second template, the *Work Plan Template*, functioned as the road map for the week. Each project manager, aided by the team, identified all of the tasks necessary to complete the project and determined task dependencies to develop a project workflow. Created in Google Sheets, the *Work Plan* was a spreadsheet in which each individual task was represented as a row in the sheet. For each task, the project manager filled out the following fields (columns) per the specifications provided:

- **Task:** A task is any sort of activity that needs to be accomplished in order to meet the project deliverables. A task should be as atomized as possible—it should not contain sub-tasks or multiple components. Treat each component as a unique task and note its relationship to other tasks (dependencies) in columns C and D.
- **Deliverable:** List the project deliverables (from project scope) associated with this task. There can be more than one deliverable associated with a task, and more than one task associated with a given deliverable.
- **Dependent Tasks:** List any tasks that must be completed before this task can be completed.

- **Post-Tasks:** List any tasks that cannot be completed until this task is accomplished.
- **Start Date:** Enter the start date for the task. YYYYMMDD. (can enter in any format; will be automatically reformatted. Ex: May 16 becomes 20160516).
- **Due Date:** Enter the due date for the task. YYYYMMDD.
- **Date Completed:** Enter the date the task was completed. YYYYMMDD.
- **Who:** Enter the names of the person/people responsible for completing the task.
- **Notes:** Enter any additional notes/comments as needed here. Detailed descriptions of how tasks were accomplished should be entered in the Daily Work Log.

The *Work Plan*, if adopted properly, could ensure a thorough backwards design approach by translating the broad project goals into specific, tangible, and measurable work processes. Should a team get stuck during the week, they would have the *Work Plan* to help them decouple task dependencies, figure out parallel task processes, and develop workarounds and other creative solutions. Project managers were encouraged to complete the *Work Plan* in advance of the Sprints.

Both the *Project Scope* and *Work Plan* provided macro, big-picture views of each project; the micro views of each project were articulated in the *Daily Logs*. Given the compressed time of the project lifecycle, it was important that teams not lose time each day reviewing where they were, what they had done, and what still needed to be accomplished. The *Daily Log Template* was envisioned as a record of all tasks completed each day of the week, a daily snapshot that could provide continuity across the week and keep the team on track. In addition to some basic project metadata, the log included prompts for succinctly summarizing the previous day's work, describing the current day's work, and projecting the work to be tackled for the following day:

- **Overview of Project:** Include a brief description of the project, which may evolve over the course of the week (copy from the Project Scope, but adjust as needed).
- **Review of significant accomplishments from yesterday:** Can copy bullets from yesterday's report.
- **Today's Goal(s):** What is the team planning to accomplish today; see also yesterday's work plan (bulleted list).
- **Description of today's work:** To include: who did what; how those tasks relate to the broader goals of the Sprints.
- **Today's Challenges:** List any challenges the team faced today, and discuss possible solutions discussed, attempted, and/or planning to pursue.
- **Additional Needs:** Are there unanticipated resources needed to accomplish the project that today's work has revealed?
- **Overview of today's significant accomplishments:** List major tasks completed or significant progress made.
- **Work plan for tomorrow:** What elements of the project will the team tackle tomorrow? This plan should align with the overall work plan for the week to ensure that the project stays on track.

### *Format and Use of Templates*

The templates were created in Google Drive to facilitate easy sharing with the teams. Each project had a dedicated folder with a copy of each template and five copies of the *Daily Log*, the first of which was used to capture pre-planning work completed prior to the start of the week. Templates were pre-populated with the project name, team members, and basic project overview. The Sprint coordinators chose Google Drive in order to run the Sprints in the spirit of sharing

and collaboration. Google Drive enabled each team member to see their own materials, while enabling teams to see the work of other teams. This would help teams if they got stuck during the week, and the transparency would create a strong sense of accountability, not just to the individual project, but to the overall pilot itself. Moreover, utilizing Google Drive enabled the Sprint coordinators to monitor daily activities and identify potential roadblocks that might hinder the completion of the project if left unchecked.

Templates were crafted as Google Docs and Sheets, rather than writable PDFs, in order to facilitate adaptability. Teams were encouraged to modify the templates to suit the particular needs of the project and the working styles of the team members. One team, for instance, reformatted the *Project Scope* template to make it more visually compelling and thereby easier to use, particularly as a document for quick reference. Another team adopted a minimalist approach to the templates, choosing instead to document major details elsewhere. The third team used the templates heavily, and created additional materials to document specific and technical workflows so that the faculty member could work independently after the Sprints concluded. These multiple uses of the templates emerged organically and in response to particular team dynamics.

Balancing the structure of the project management tools and methods with the need to remain agile and responsive was an important element not just of each team's success, but also the overall pilot's success. It helped demonstrate the value of project management in library work while also highlighting the broad range of library expertise at work.

### *The Important Role of Project Managers*

In addition to the templates, each team was assigned a project manager with several specific responsibilities and areas of oversight prior to and during the Sprints. Each project manager was a librarian and member of the Faculty Center. Specifically, the project managers were

responsible for coordinating the work of their teams, doing some pre-Sprint planning, completing the three templates, especially the daily logs, and communicating back to the two Sprint coordinators, who provided an additional layer of structure and support. One of the Sprint coordinators also served as a team project manager at the request of a faculty PI. The other coordinator served as a “floating” coordinator, moving from project to project to offer high-level coordination, feedback, input, and assist with technical tasks.

The Sprint coordinators built in an additional layer of structure, coordination, training, and reflection for the project managers, which was particularly helpful since two of the three were relatively inexperienced in project management. In advance of each team’s pre-planning meeting, the project managers met with the Sprint coordinators to discuss the overall goals of the pilot, the unique role of and expectations for the project manager, and how to use each template. The group strategized about the pre-planning process, recognizing the importance of getting a running start to the week. To keep the teams on track, the coordinators built in checkpoints for the project managers throughout the week. The first checkpoint was the end of the first full day of the Sprints; the focus of this meeting was largely logistical—addressing equipment and connectivity issues, exploring alternative note-taking and documentation approaches, and reflecting on the value of the pre-planning phase.

The second project managers’ meeting, again led by the Sprint coordinators, occurred midway through the week and served as a more substantive reflection period. This meeting provided an opportunity to assess whether the projects were on track to be completed, and if not, to identify any obstacles and brainstorm potential workarounds and solutions. In addition, the project managers and Sprint coordinators discussed physical and technical infrastructure, team dynamics, and whether the project management tools were facilitating or hindering progress for

each team. Perhaps not surprising, each team approached the tools differently; one team embraced the tools outright while another resisted the tools because they imposed too much structure at the expense of the creative play team members felt was central to their process and project work. In the case of the latter, the project manager used the tools in the background, freeing up her teammates to do their work in a less structured way. The team was largely unaware of the project manager's use of the tools. While the tools helped the project manager stay on track, she used other approaches to shepherd her team along that aligned more closely with the team's style of project work.

During this midweek meeting, the Sprint coordinators emphasized the importance for project managers to be as flexible as possible in order to be responsive to their teams. Whether it was adjusting the details of the work plan, restructuring the templates to match the needs of the project, or rendering the tools less visible, each project manager calibrated and recalibrated her approach based on perceived and stated needs. All teams found additional, and alternative, methods for notetaking and more detailed documentation. All three teams reported at this mid-week meeting that they were running out of steam, but with the end in sight, all articulated confidence that they could cross the finish line.

### *Public Showcase*

The ultimate success of the pilot could not be anticipated in the months and weeks leading up to the Sprints. The Sprint coordinators could not have predicted or guaranteed fully that the selected projects were of an appropriate scale to be completed in a week, though previous project management experience served as a useful gauge. Nor could they be assured that the teams would gel, that team members would complement each other and that no team would have a

significant gap in expertise. And so, taking stock of where each team was at the mid-week project managers' meeting, the group determined that the end-of-the-week lunchtime group reflection might grow into a more formal showcase. Project managers were asked to return to their teams to develop a plan of action for sharing out their work, while the Sprint coordinators worked to invite KU Libraries administrators. Each team prepared a brief presentation, covering project goals, processes engaged, and final outcomes. Members of the Research & Learning Division and Libraries Communication Team, who had been photographing the entire week to document the pilot, attended the lunch. Perhaps because the presentations were more formal than originally envisioned, there was not sufficient time for reflection and debriefing. Follow-up surveys—one for the faculty and another one for the library participants—were distributed a few weeks after the Sprints concluded to assess the overall program and the project management tools. As with the planning and implementation stages of this pilot, project management informed the evaluation phase. Assessment results were shared with colleagues who would serve as coordinators in a future round of Sprints, in order to inform and improve future implementation.

## **ANALYSIS**

### *Faculty Feedback*

The three faculty members expressed extreme satisfaction with the pilot. All said the Sprints exceeded their expectations, and that they met all of their project goals. Each had already sought help from KU Libraries at least once during the 2015-2016 academic year; but it is clear that the Sprints provided the faculty with a deeper view of the broad range of library expertise and thereby would facilitate future user engagement. All noted they would be extremely likely to seek additional help on their project after the Sprints, and to come to KU Libraries for a future

project. Their high level of satisfaction suggests that the Sprints model is an effective method of engagement and a good way to build deep, lasting relationships between librarians and their faculty patrons.

Regarding the use of the in-house project management tools, faculty participants interacted with these tools to varying degrees. All made use of the overall Google Drive project folder, though one participant did not rely on it consistently. Faculty members used the *Project Scope* less regularly. By contrast, only one faculty PI used the *Work Plan* or the *Daily Work Logs*, either regularly or sporadically. One faculty PI explained that they did not feel it necessary to use these tools because the project manager handled it. Another faculty PI emphasized the way in which their team worked on the fly, relying on serendipity rather than explicit structure to complete the project. The third faculty PI noted that their team took a very “sequential” approach with their work flow, and thus did not need to refer back to the tools, particularly the *Work Plan*. Usage tended to correlate with overall attitudes. While all faculty found the Google Drive project folder very useful as a central place to access and share information, they were less favorable to the other tools. In particular, the *Work Plan* was judged somewhat or not at all useful by two-thirds of faculty participants. The *Daily Work Log* fared slightly better. Faculty tended to value the collaborative potential of the tools, but some pointed out that the *Work Plan* and *Daily Logs* did not need to be used by all.

In contrast, the project managers used all of the tools provided. It is interesting to note that some of the faculty members did not see the value or need for these tools, despite the team’s overall, if covert, reliance on the tools. This suggests that these tools, so essential for each project’s successful completion, were more important and valuable for the librarians/project managers. The librarian feedback, noted below, confirms this.

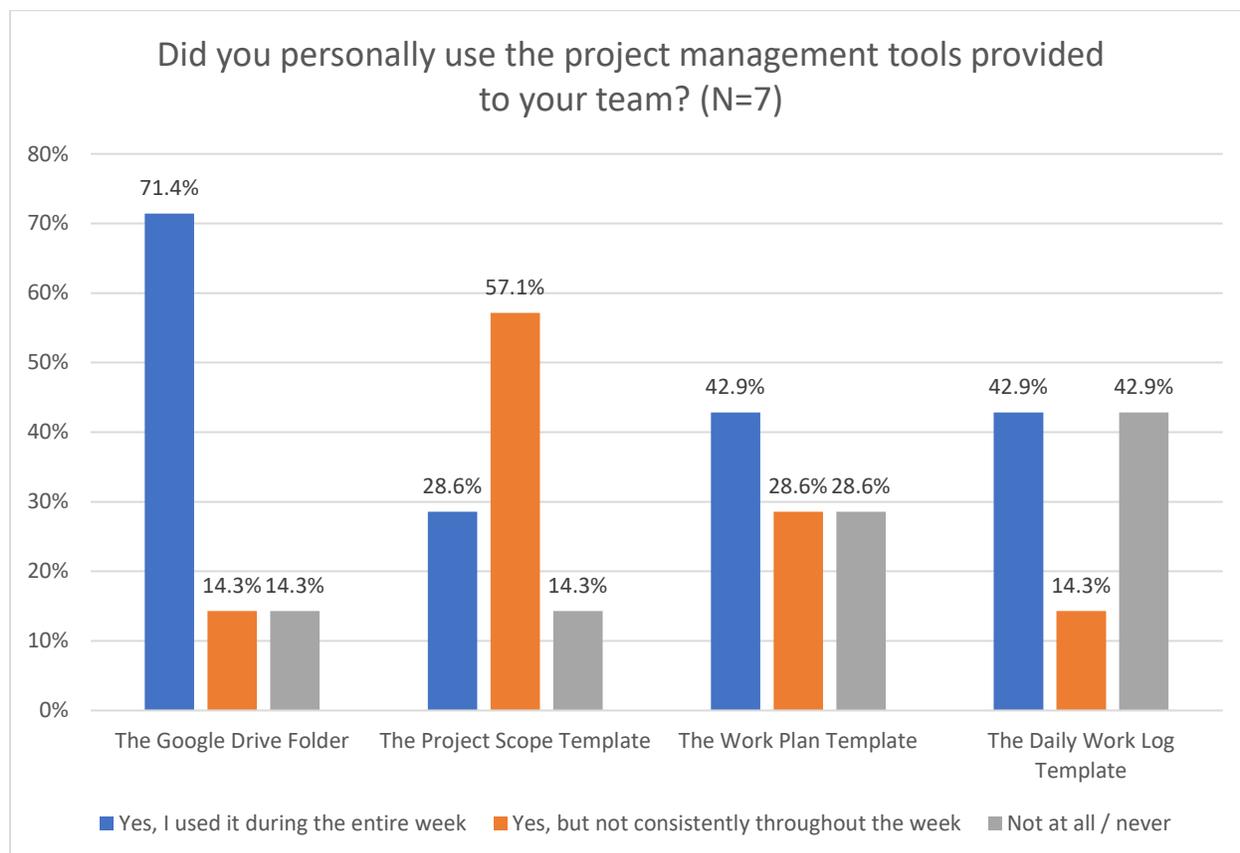
Faculty members were also asked whether they used or needed additional tools not provided. While no one reported needing additional tools that they were unable to access, all three noted their reliance on some additional tools. The tools ranged from a Zotero group library for sharing resources, to specific GIS tools to complete the mapping component of one of the projects.

### *Librarian Feedback*

In polling the library participants, the Sprint coordinators were particularly interested to see whether they felt well-suited to their projects, and that they were able to apply and demonstrate their expertise. Eight out of nine library participants, including the project managers, responded to the assessment survey; the ninth librarian was only tangentially involved and thus did not feel capable of responding. All library respondents reported that their project was a good fit for their skills and experience, which underscores the importance of identifying and recruiting the right people for the team. Moreover, most participants felt they had a clearly defined role on their team, a role that was driven by the project scope and work plan.

Library colleagues were asked the same questions as the faculty regarding the various project management tools. Usage varied across the seven respondents who completed this section of the survey; most library team members made regular use of the overall Google Drive Folder—71.4% used it throughout the entire week and another 14.3% used it inconsistently (the other 14.3% did not use Drive). The *Project Scope* was used sporadically during the week—28.6% used it regularly, 57.1% used it inconsistently, while 14.3% did not use it at all. About 43% of respondents used the *Work Plan* and *Daily Work Logs* regularly during the entire week. The *Daily Work Logs* saw the highest percentage of non-use of any of the tools: 42.9% did not

use at all, though an equal percentage (42.9%) used consistently, and another 14.3% used sporadically (Figure 1: Use of Project Management Tools).

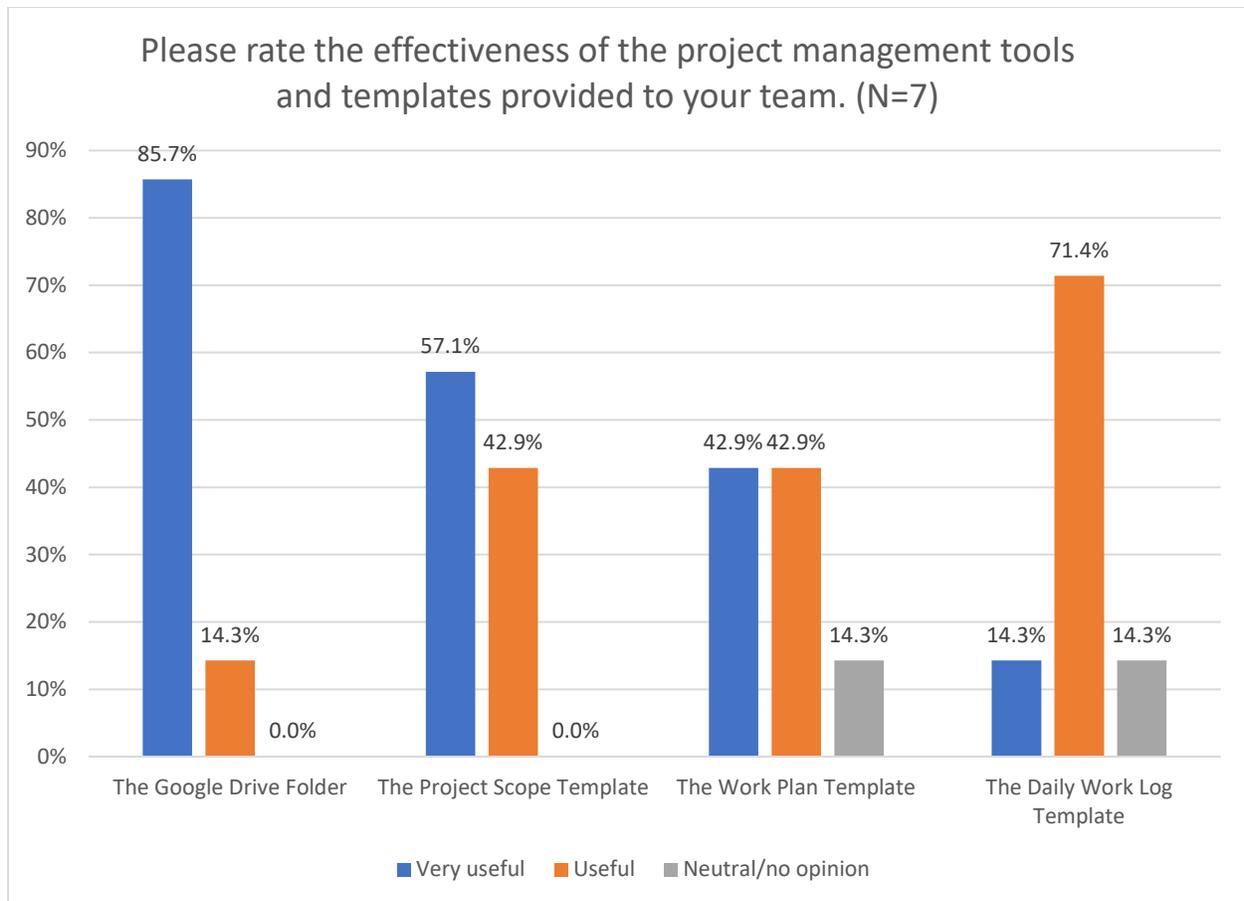


**Figure 1.** Library team members' use of project management tools

Overwhelmingly, librarians did not use the tools because they trusted their project manager would take care of completing the various templates. Some respondents indicated that they did not think the tools were relevant to their work. One project manager reported struggling to use the *Daily Work Log*, noting, "I spent my time after the work day revising my notes for the faculty member we worked with and just minimally filling out the daily log. I thought having the notes be consistent and accurate for the faculty member was more important than the daily log. I did keep the work plan up to date to try to capture everyone's [sic] role and task during the

Research Sprint.” In short, the project manager found the *Daily Logs* too cumbersome and less relevant to the faculty member’s project, and developed an alternative method for documenting the work.

Regarding the perceived effectiveness of each tool, all respondents reported the tools were either “useful” or “very useful,” except in cases where they expressed “neutral/no opinion.” No one indicated that the tools were not useful. Approximately 86% of the seven respondents agreed that the Google Drive folder was “very useful”; slightly more than half felt the *Project Scope* was “very useful.” Responses about the *Work Plan* were split evenly between “very useful” and “useful,” with another 14% “neutral or no opinion.” The *Daily Work Log* had the lowest rating for “very useful” (14.3%), and the highest “useful” rating (71.4%) (Figure 2: Effectiveness of Project Management Tools).



**Figure 2.** Library team members' rating of the tools. "Somewhat useful" and "not useful" responses were eliminated from the figure because they received no responses.

Open-ended feedback provided insight into how individuals approached the tools.

Respondents agreed that the Google Drive folder supported simultaneous collaboration while helping to organize and share documents in a central location. Likewise, comments about the *Project Scope* were largely positive; librarians noted its utility for goal setting, managing team expectations, and as an artifact for future reference. Several respondents reported that it was less useful towards the end of the week, once "we knew where we were going." Another individual mused, "Good for a 'meeting of the minds' before the project began, but the team did not physically refer to it again once the sprint was underway."

*Work Plan* feedback was mixed. While several agreed that it helped set parameters and “parse out work for each day,” many noted that it was more useful as a piece of documentation rather than a tool to be used throughout the pilot. One respondent admitted, “I think this was useful for documentation purposes to be saved for later, but during the days of the sprint we were busy with other things rather than focusing on this work plan.” A project manager confirmed this: “As the PM, it was useful for me to reflect on the team’s progress, but my team members did not consult it.”

Similarly, participants were ambivalent about the *Daily Work Log*. Several noted its importance for daily reflection and overall documentation purposes. “This was useful because it helped the team to reflect at the end of the day and helped to get us focused at the beginning of each day,” one respondent wrote. Another commented, “Although we often didn’t have much reflection to share in the log, taking the time to see what we had accomplished each day and plan next steps was a good exercise to end the day on. This also helped us get started each day because we could easily see what our tasks were for the day.” Conversely, others pointed out that the tool was too cumbersome to use: “...during the days of the sprint we were busy with other things rather than focusing on this work log. Thank goodness our PM was there to fill it in for us!” One team member thought the tool was a bit of an impediment: “Helpful for tracking individual tasks but a bit distracting for our project manager. This was less of a problem as the week went on and the actual project became more important than the documentation.”

Overall, explicit use of the project management tools tended to correlate with team role; perhaps not surprisingly, project managers made the greatest use of the tools, while other team members relied on their project managers for structure and direction. Faculty participants, who

had the greatest investment and ownership in the projects, typically had an inverse reliance on the tools; some did not fully realize that the tools were being used.

## **DISCUSSION**

### *Project Management Matters*

The overall success of the Research Sprints pilot is in part attributable to the use of project management approaches and tools. The structure and organization ensured project completion in the compressed timeframe, even if some participants actively rejected the tools. Enough participants used the tools with enough frequency to suggest that the tools were helpful to some extent. One possible, if indirect, measure of the project management tools' utility might be gleaned from faculty members' overwhelming satisfaction with the overall outcome of their weeklong sprint. While it is not possible to gauge whether each team would have met with the same degree of success without these tools, the tools offered a degree of consistency and coherence across the three teams. In addition, the tools enabled teams to explicitly document and reveal librarians' contributions to the projects, and to continue to develop the Sprints program in an informed way.

### *Sprints as a Model*

There were several unintended outcomes from the Sprints pilot. First, several of the library participants reported that they preferred this concentrated structure for work on large projects over the more common committee work structure that tends to be spread out over many months, with progress made intermittently. This committee model, they admitted, hinders making substantive progress, with so much time at each meeting devoted to recapping previous accomplishments and planning next steps. Indeed, several of the participants adopted a sprint-like model later that summer to complete an information literacy course redesign.

Moreover, several academic libraries in North America expressed interest in the Sprints, including two large research libraries; a third librarian inquired about the pilot but did not think her library was ready to undertake the program without proper training in project management. One very large research library ran a successful pilot in May 2017 with seven projects (and KU ran a second set of Sprints in May 2017 with new coordinators at the helm). The original Sprint coordinators shared their processes, structures, and tools, as well as the lessons learned, with this other institution. At the time of this writing, the second institution had begun spearheading efforts to create a web-based toolkit for others who want to run a similar initiative. Past and current Sprint coordinators from KU are contributing to these efforts. It is hoped that this resource will continue to grow as other institutions adopt and adapt the Sprints for their own local environments and share their experiences.

#### *Flexibility and Reflection are Key*

The most important lesson learned during the pilot was the need for flexibility. The project management processes and templates provided necessary structure to ensure success, but, as described above, people responded differently to that structure for many reasons, from varying work and communication styles, to designated roles, to the specific tasks they were assigned. Project management tools should be adapted and repurposed, rather than overly prescriptive. Library staff will resist, if not outright reject, tools that are forced upon them, particularly if a tool cannot be customized in creative ways. Moreover, the tools should not be too cumbersome or onerous to use. One respondent observed that the *Work Plan* “was more detailed than I would have done but I was not project manager, so it was fine.” This implies that the respondent chose not to use the tool because it was too detailed, and thus was too cumbersome to use.

An additional lesson learned was the importance of reflection to the work, and to project management more broadly. While the Sprint coordinators anticipated and accounted for some reflection time throughout the pilot, they did not frame the *Daily Work Log* as a tool of purposeful reflection, though participants valued the logs for this reason. Points of purposeful reflection should be incorporated into overall workflows and processes, and not just at the completion of a project. Reflection allows the team to identify potential obstacles and correct course.

## CHALLENGES

As an approach to faculty engagement, the Sprints model poses some potential challenges for library management and staff to consider. Several of the more notable challenges are noted here.

First, the need for robust and formal staff training in project management processes and tools is essential to the successful implementation of project management methods in a library setting. Training may help alleviate anxiety about adopting project management processes, and perhaps mitigate against internal resistance. There was a wide response to the tools during the Sprints, from enthusiastic adoption, to indifference, to open hostility. Forcing all library staff to adopt a singular tool or approach without the ability to customize or develop their own sub-processes and tools could backfire on library administration.

Another major challenge was library staff capacity and related issues. While there is a rich variety of expertise in the library, identifying individuals with the right expertise who could commit to the full week, and whose supervisors would authorize the release time, can be tricky. The Sprints pilot exhausted a significant amount of library resources, not to mention the pre-planning resources required. Eleven members of KU Libraries were invited to participate, in addition to the photographer, several of whom already had commitments for part of the week

which needed to be accommodated. Participants were drawn from four separate units, and four separate meeting rooms or work labs were commandeered for the week. The Sprint coordinators estimate that the pilot required more than 640 combined hours of labor leading up to, during, and after the week. Moreover, as the week drew to a close, the Sprint coordinators realized that long-term project tracking had not been anticipated, making future progress harder to follow, especially as the Sprints program grew over time. And how could organizational and staff capacity be managed to work on a growing portfolio of projects over time?

Timing of the Sprints is a related challenge. The faculty all agreed that the week after Spring Commencement was a good time to hold the Sprints, because they were done with their teaching responsibilities but not so far into their summer research agendas as to be disrupted. Library staff, on the other hand, do not always adhere to the same semester rhythms. Sixty-three percent of library participants said it was somewhat easy to commit to the full week; 38% said it was somewhat difficult. And for those who did participate, pacing was also a challenge. The Sprints were designed as a full week of intensive work, and burn-out by midweek was a real danger. Building in reflection points can help with pacing, as team members can hit pause, regroup, and return more refreshed to the work.

A further challenge, common to all collaborative and group work performed in close quarters, is interpersonal dynamics and teambuilding. Would the teams perform well, or would they get stuck in the storming phase? Would project managers be able to resolve conflict? There was not sufficient time during the week to account for significant teambuilding, even with the pre-planning meeting occurring before the official start. Teams did not have time to develop trust, and some individuals were collaborating with each other for the first time. There was little the Sprint coordinators could design in terms of a tool or template that could address bad team

dynamics, though the project manager check-ins were scheduled in anticipation of this possibility. And while there were no significant issues related to team dysfunction, interpersonal conflict poses a threat to any project, no matter the timeframe.

The final challenge relates to project selection. In order for week-long Sprints to work, the projects must be an appropriate scope and scale that can be feasibly completed in about four days, and be aligned with available staff expertise. Faculty are not always able to fully predict anticipated needs and deliverables, thereby making selection even more difficult. In this case, the coordinators' previous experience working on digital projects helped to spot red flags and unrealistic elements in project proposals during the selection process. But how does one go about training another person in identifying suitable projects? How can a robust rubric be designed to assist novice project managers in the selection process while remaining flexible enough to be applied to a wide variety of projects?

## **CONCLUSION**

As this pilot suggests, project management is an area of library expertise that can be cultivated as a way to strengthen and deepen outreach and engagement with users. While all of the faculty participants had relied on the library at least once in that academic year, the success of the Sprints pilot increased faculty perception of library expertise, thereby improving users' view of what academic librarians can offer. Early feedback suggested that an intensive, week-long collaboration did indeed become the foundation for a long-term and meaningful partnership between users and the library. One faculty PI's project is moving forward to a new stage with external grant funding, and KU Libraries anticipates an ongoing collaboration with the faculty PI as the project progresses. The second faculty project is being implemented in the classroom in

the 2017-2018 academic year. And the third faculty member continues to reach out to their Sprints team members for guidance and collaboration as the project grows.

This being a pilot project, substantive evaluation and long-term tracking were not built into the project management tools, but participants proposed ways to fold this into future cycles. Many suggested incorporating longer-term tracking into existing workflows, for example, noting in KU Libraries' consultation and instruction reporting mechanisms when consultations are Sprints-related. Several librarians suggested regularly checking-in with faculty partners for informal progress updates, or scheduling public events to share progress.

Tracking and assessment should be built into the project management tools themselves. Why not create a fourth template, *Project Tracking Template*, to facilitate tracking? This could be a simple one-page form that is completed at regular intervals, whether once a semester, quarterly, or annually. It could be modeled on the *Daily Work Log*, where faculty members and the original project managers report on progress made towards new outcomes and deliverables, while charting possible future directions. The Sprint coordinators would ensure that this follow-up happens regularly. These reports could be folded into existing internal and external reporting mechanisms, and be used to help tell the story of the library's value to its community.

While a program such as the Research Sprints is resource-intensive and only directly impacts a select subgroup of users, the program can potentially be scaled up or down to engage with particular users. Developing strong relationships with "power" users can transform them into important ambassadors for the library, and bring in more members of the community. And while Research Sprints cannot be used for all partnerships, the project management approaches, structures, and tools employed can be applied to a broad range of library projects and programs in the service of enhancing user engagement, and thereby improving library service to them.

Moreover, utilizing project management approaches helps libraries demonstrate a broad range of expertise, and thereby transform users' perceptions of libraries.

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## APPENDIX A

### *Call for Proposals (CFP): Research Sprints: One Week, One Project*

#### **Description**

*Research Sprints*, sponsored by KU Libraries, offer faculty the opportunity to partner with a team of expert librarians on a specific project, or component of a broader project. Sprints differ from one-time research consultations in their timing and depth of interaction. Individual or teams of faculty may apply to work intensively with a team of librarians for one business week (roughly 35-40 hours) during the May 2016 intersession (May 16-20; dates are negotiable). The intent is for the entire team—faculty and librarians—to work without distractions for that period of time, to produce a tangible product or outcome.

Proposals should be for a project that can be completed in the one-week timeframe. Proposed projects need not be stand-alone; they can be a component or a module of a larger project that helps meet a well-defined milestone towards a bigger goal.

We will work to match faculty members with the appropriate areas of expertise from across KU Libraries in alignment with the needs of the project. Areas of expertise include but are not limited to:

- Archival research
- Bibliographic research
- Data management
- Data visualization

- Digital scholarship
- GIS and geospatial research
- Information management
- Knowledge representation
- Metadata creation and management
- Open access and open educational resources
- Pedagogy and instructional design
- Project management
- Scholarly communication and copyright

We anticipate accepting up to three proposals in this pilot phase. Acceptance will be determined by the selection criteria listed below, as well as the availability of library resources and staff to contribute to the project.

### **Suggested Topics**

Faculty members may apply to work on a broad range of projects, including but not limited to:

- Data set development or preparation
- Data visualization
- Digital pedagogy, such as developing a digitally-centered syllabus, course module, or assignment
- Digital scholarship project development, including digital humanities projects
- External grant proposal
- Open Educational Resource (OER) development

- Research-based course assignment redesign
- Spencer Research Library Distinctive Collection-based project, either to incorporate a particular collection into a class or into a research project; see [spencer.lib.ku.edu/collections](http://spencer.lib.ku.edu/collections) for details about available collections.

Research Sprint awards are not intended for primarily service and support activities, such as:

- straight digitization project with no additional research component
- copyright clearance and other related services
- metadata creation
- workshops and training

**KU Libraries will host an Information Session on March 21 from 1-2pm in Watson**

**Library, room 455.** Interested applicants are invited to attend to learn more about the program, discuss the application process, and share their project ideas with each other. To RSVP, please email Dr. Pam Lach ([plach@ku.edu](mailto:plach@ku.edu)).

**Our Commitment / Your Commitment**

KU Libraries commits to partnering with selected faculty members to help complete a project.

*Research Sprints* are not intended exclusively as a service in which faculty hand off a project.

Rather, our team of librarians will work *with* each faculty member, partnering to reach a shared goal. Each team will be staffed with a project manager who will organize the team and collaborate with the faculty member throughout the planning process.

For qualifying projects, KU Libraries will provide between \$300 and \$500, depending on the availability of funds, to support project completion. Funds might be used for the purchase of software or other supplies that directly advance the project. Faculty members who seek financial support should include a brief description of their needs and the anticipated costs.

Faculty members commit to being available for the entire week, May 16-20 or at another time mutually agreed upon by the entire team. Faculty members are encouraged to apply in teams on a collaborative research project; all members of the team must be available to work during the agreed upon time. Participating faculty agree to focus exclusively on their project during the week of the sprint. Faculty members will be available as needed in advance of the week-long sprint to ensure the planning process is thoroughly completed. Faculty members agree to participate in assessment activities at the conclusion of the sprint, and to share their project outcomes in a public showcase.

## **Outcomes**

In addition to a completed project, faculty members are expected to:

- Produce a digital portfolio or representation of their project to be featured in an online showcase. This portfolio should articulate how the final product of the sprint fits into the faculty member's scholarly and/or pedagogic agenda. If the project is a component of a larger work, the portfolio should articulate how the research sprint advances the larger project.
- Participate in a showcase event to share their work processes and results.

## Eligibility & Selection Criteria

Project proposals will be assessed and selected based on the following criteria:

- **Feasibility:** The scope/scale of the project can be completed in one week
- **Impact:** Priority will be given for projects that demonstrate the impact of the project on the faculty member's research or teaching
- **Rationale:** Faculty members should explain their rationale for wanting to partner with KU Libraries to accomplish their project. *Note: KU Libraries expertise and capacity may not be sufficient to support certain proposed projects. KU Libraries reserves the right to decline a proposal if we feel we do not have the expertise and capacity to support it. We encourage applicants to contact appropriate librarians to discuss or help shape proposals in advance.*

Eligibility is limited to KU tenured or tenure-track faculty members (and faculty equivalents), adjunct faculty, and academic staff. Graduate students may participate on teams as long as the primary researcher is a faculty member or academic staff.

## Application

A completed application should include the following:

1. **Project Narrative:** The project narrative should be no more than five pages, double spaced, with one-inch margins and 12- point font. It should address the following components:
  - a. **Project Description:** The project description should be a clear and concise explanation of the overall proposed research project, including methods and

sources being used, scope of activities for the week of the Sprint, outcomes, and significance to the faculty member's overall field of study or teaching activities

- b. **Impact:** The impact of the project on the faculty member's research and/or teaching agenda.
  - c. **Broader Research Project:** If the proposal is part of a larger project, address the relationship of this component to the overall research project (not applicable to proposals for stand-alone projects).
  - d. **Selection Criteria:** The narrative should address the selection criteria listed above, including the envisioned role of the KU Libraries team.
2. **Anticipated Needs:** Please include a brief list of anticipated resources and/or expertise needed to complete the project. This information will help shape the formation of the library team that we will create for your project.
  3. **Budget and Justification:** Faculty members who anticipate costs associated with the completion of their project should include a high-level budget up to \$500, with a brief explanation of each anticipated cost. Please note that including a budget in the application does not guarantee funding if selected.
  4. **Brief CV (2 pages);** for faculty members applying as a team, each participant should include a brief CV.

**Completed applications should be submitted via email to Dr. Pam Lach ([plach@ku.edu](mailto:plach@ku.edu)) as a single PDF file no later than Friday, April 8 at 5pm.** Questions about the application may be directed to Dr. Pam Lach, Head of the Center for Faculty Initiatives and Engagement, KU Libraries, [plach@ku.edu](mailto:plach@ku.edu), 864-0577.

## **Upcoming Dates and Deadlines**

March 21	Information Session: 1-2pm, Watson Library 455
April 8	Application submission deadline by 5pm
April 18	Winners notified
April 29	Sprint teams selected/formed
Early May	Research Sprint Planning Meeting (TBD)
May 16-20	Research Sprints
May 23-29	Evaluation and assessment of pilot
TBD	Research Sprint Showcase

## **APPENDIX B**

### *Research Sprint Templates*

Each of the three templates are accessible via a public Google Drive Folder:

<http://tiny.cc/sprints-templates>.