

**Project Management Plan**  
**Pilot Project: *JNF Relocation***  
**October 15, 2016**

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## **Introduction**

The Metropolitan Library has approved the initiation of JNF Relocation as part of phase 1 of the Fall 2016 Pilot Projects.

We will be moving all of our JNF materials from being interfiled with the adult materials on the second floor to being shelved separately on the first floor. In order for this to happen, we will need to move the adult DVDs to the second floor and buy new shelves for the JNF collection to reside on.

## **Problem Statement**

The Juvenile Nonfiction (JNF) collection has historically been shelved within the Adult Nonfiction, making it hard to browse. Because this collection is basically hidden within a larger collection, it has also traditionally had lower circulation numbers, leading to heavy weeding of hardly used materials. At the Downtown Library, we have the additional consideration that the JNF collection is on a different floor than all of the other materials intended for youth. This physical barrier prevents our young members from encountering, browsing, and finding materials intended for their age group. This project is intended to better connect young members with materials designed for their reading levels and age group.

## **Project Management Approach**

The Project Lead, Risa Sargent, has the overall authority and responsibility for managing and executing this project according to this Project Plan. The project team will consist of Teresa Matthews, Abigail Stout, Judie Matthews, and Vicki Thompson. All project and subsidiary management plans will be reviewed and approved by the project sponsor. All funding decisions will be approved by the project sponsor, then delivered to the Project Manager, Vicki Thompson.

Any delegation of approval authority to the project lead should be done in writing and be signed by both the project sponsor and project lead. The project lead is responsible for communicating with organizational managers on the progress and performance of each member of the project team.

## **Project Scope**

*[In one or two paragraphs, list what this project will entail as well as any out-of-scope items. Do not list goals, but instead the specifics of what this project includes and does not include. For example, out-of-scope items for the Popup Libraries might be: the project will not include visits to locations outside of the Community Libraries during phase 1.]*

The JNF Relocation will require moving existing furniture and shelving and adding new shelving to house the JNF collection on the first floor. Our first step will be weeding the JNF collection down to a proportionate collection for our location and removing materials older than 10 years that have not circulated in 2 years. Two tables on the second floor will need relocating to the first floor. Library staff will move the DVDs to portable shelving while Maintenance moves the shelving to 2<sup>nd</sup> floor, and then library staff will reshelve the DVDs upstairs. A vendor will ship

and install new shelving for the JNF collection. Library staff will move the JNF collection to the new shelving.

Items beyond the scope of this project will be the redesign of the YA space (next to where the JNF materials will be housed), which has been budgeted for in this fiscal year. Any relocation of materials other than the DVDs and JNF materials will also be outside the scope of this project.

## Milestone List

The chart below lists the major milestones for the JNF Relocation. This chart is comprised only of major project milestones such as completion of a project phase or gate review. Greater specificity for these milestones is included in the project schedule and Work Breakdown Structure. Any scheduling delays which impact a milestone or delivery date must be communicated immediately to the project lead so that proactive measures may be taken to mitigate the impact on the overall schedule. Any approved changes to these milestones or dates will be communicated to the project team by the project lead.

*Examples of milestones: project planning, procurement of materials, technical installation, design, training, implementation, review and analysis, project end/phase end. Include milestones on chart below:*

Milestone	Description	Date
Project Planning Complete	Planning and team schedules established	
Costs of shelving and endcaps authorized	Leadership team authorizes costs	11/16/16
Order Shelving	Shelving and endcaps will be entered in IntAcct and ordered	11/18/16
Marketing Posters displayed	Marketing completes and delivers posters/banners, Library staff put them on display	11/21/16
Prep for New Shelving Complete	Maintenance moves the 2 large tables from 1 <sup>st</sup> floor to second floor; Library staff moves DVDs to portable shelving; Maintenance moves DVD shelving to 2 <sup>nd</sup> floor; <b>Completed ahead of schedule 11/1-11/3</b>	12/19/16
New Shelving Installation Complete	Vendor will install new shelving 5-7 weeks after ordering	12/31/16
JNF Move Complete	Library staff will move JNF materials	1/3/17
John Rex School Resumes		1/4/17

## Schedule Baseline and Work Breakdown Structure (WBS)

The WBS for [project title] (included in Appendix A) is based on blocks of work which do not exceed **40 hours of work but are at least 4 hours of work.** Work packages were developed through collaboration among project team members and stakeholders with input from functional managers and experience from past projects.

The project schedule was derived from the WBS and Project Charter with input from all project team members. The schedule was completed, reviewed by the project sponsor, and approved and base-lined. The schedule will be maintained as a Gantt chart by the project lead. Any proposed changes to the schedule will conform to the Change Management Plan set forth in this document. The project lead and project team will determine the impact of any changes on

the schedule, cost, resources, scope, and risks. If it is determined that the impacts will exceed the boundary conditions (below), the potential change will be forwarded to the project sponsor for review and approval, followed by the project manager. The boundary conditions for cost-performance (CPI) and schedule-performance (SPI) are:

CPI less than 0.8 or greater than 1.2

SPI less than 0.8 or greater than 1.2

Any changes approved by the project manager will be implemented by the project lead who will update the schedule and all documentation and communicate the change to all stakeholders in accordance with the Change Management Plan. Documenting and approving changes are

### **Change Management Plan**

The following steps define the change control process:

Step #1: Identify the need for a change (Any Stakeholder)

Requestor will submit a completed Change Request Form to the project lead

Step #2: Log change in the change request register (Project Lead)

The project lead will maintain a log of all change requests for the duration of the project

Step #3: Conduct an evaluation of the change (Project Lead, Project Team, Requestor)

The project lead will conduct an evaluation of the impact of the change to cost, risk, schedule (primary and secondary deliverables), and scope

Step #4: Submit change request to Change Control Board (CCB) (Project Lead)

The project lead will submit the change request and analysis to the CCB for review

Step #5: Change Control Board decision (CCB)

The CCB (consisting of the Executive Leadership Team, and chaired by the Project Manager) will discuss the proposed change and decide whether or not it will be approved based on all submitted information

Step #6: Implement change (Project Lead)

If a change is approved by the CCB, the project lead will update cost and schedule baselines and project documentation as necessary and will communicate the changes to the project team and stakeholders

Any team member or stakeholder may submit a change request. The project manager will chair the CCB and any changes to project scope, cost, or schedule must meet their approval. All change requests will be logged in the change control register by the project lead and tracked through to completion whether approved or not.

### **Communications Management Plan**

This Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout project lifecycle and will be updated as communication requirements change. This plan identifies and defines the roles of team members as they pertain to communications. It also includes a communications matrix to map

the communication requirements of this project, and communication conduct for meetings and other forms of communication. A project team directory is also included to provide contact information for all stakeholders directly involved in the project.

The Project Lead will take the lead role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix below. The Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it, and to whom to communicate.

Communication Type	Objective	Audience	Frequency	Sender/Owner	Method/Format	Deliverable	Communication should include
Internal Project Status Report	Review the status of the project with the team	All project team members	Weekly	Project lead	Email	(Internal) Status Report	Milestones completed, any known or resolved issues and risks, important future dates, open questions/decisions needed, and budget status
Team member progress report	Describe progress and known issues	Project lead	Weekly, or as-needed	Team members	Email or brief in-person / phone meeting	Updated project schedule	Team members update team leads or project lead of any progress made or known issues. This is an opportunity for team members to safely raise scope, time or budget issues
Change Request	Formally log changes that impact scope, schedule or budget	Project Lead, Project Manager Sponsor and Stakeholders	As needed	Project lead	Email and/or discussion of changes needed	Project Change Request Form	Completed Form
Stakeholder update	Communicate major work completed and keep stakeholders informed	Project Manager, Project Sponsor, and stakeholders	biweekly, following key project phases, or as needed	Project lead	Written report, email or meeting	Stakeholder Project Status Report	Project overview, progress, major milestones, schedule, scope and budget. Include any changes that may be counter to stakeholder(s) expectations for the project
External Communications	Publicity or messaging to describe key project results (anticipated or real)	Stakeholders, external audiences	As needed	Project lead	Press releases, emails, social media, etc.	TBD in External Communications Plan	?

Project team directory for all communications is:

Name	Position/Role	E mail	Office Phone	Cell Phone
Risa Sargent	Project Sponsor	<a href="mailto:Risa.sargent@metrolibrary.org">Risa.sargent@metrolibrary.org</a>	3893	405-924-2860
Vicki Thompson	Project Manager	<a href="mailto:Vicki.thompson@metrolibrary.org">Vicki.thompson@metrolibrary.org</a>	3752	
Risa Sargent	Project Lead	<a href="mailto:Risa.sargent@metrolibrary.org">Risa.sargent@metrolibrary.org</a>	3893	405-924-2860
Teresa Matthews	Team Member	<a href="mailto:Tmatthews@metrolibrary.org">Tmatthews@metrolibrary.org</a>	3892	
Abigail Stout	Team Member	<a href="mailto:Abigail.stout@metrolibrary.org">Abigail.stout@metrolibrary.org</a>	3866	
Judie Matthews	Team Member – JNF Collection Owner	<a href="mailto:Judith.matthws@metrolibrary.org">Judith.matthws@metrolibrary.org</a>	3880	

Stakeholder Register:

Name	Position/Role	Project Expectations	Potential Influence	Notes/Preferred Communication Methods
Tim Rogers	Metro Library Executive Director	Project objectives met on-schedule and within budget	Budget and reporting	Project manager will give monthly updates
Julie Ballou	Regional Director	<p>The existing system approach to shelving the JNF materials with the ANF materials limits browsing for young members. At the Downtown Library it presents an even greater challenge due to materials being spread out over two floors. The Downtown Library is therefore an excellent location to pilot a project for separating the JNF out of the ANF collection and placing the materials in closer proximity to other</p>		<p>I look forward to email updates on the implementation of the project as events occur such as shelving order submitted, DVDs moved to 2nd floor, etc. Once the project has been fully implemented, monthly updates comparing circulation for the same period the previous year would be beneficial. In addition, frontline staff sharing feedback from members would also be helpful.</p>



		materials for youth. I anticipate seeing increased circulation and ability to provide a satisfying experience for members. It is a project that I believe exemplifies putting library members first.		
Kim Terry	Marketing Director	All project marketing is consistent with the Metro brand	Timeline for MAC deliverables	Project Lead will update when MAC-related events arise
Jim Phillips	Maintenance Project Coordinator		Timeline for MTC assistance	Project Lead will update when Maintenance-related events arise
Melissa Weathers	Materials Selector – JNF	That the JNF collection will be better utilized by our student members due to easier access. That the JNF collection will be further developed as the collection can be more easily seen as a whole rather than interfiled with the adult collection.	I will be available to help weed the collection to rid it of outdated and worn materials. I will be available to advise on weeding practices. I will continue to select for this collection. Being able to see the entire collection together rather than interfiled with the ANF collection will show me how to better build the collection for our members' needs.	Email; copy Janet Brooks (MSL) on emails Frequency: Depends on speed of the project. Bi-weekly; more often as needed.

## Communications Conduct:

### Meetings:

The project lead will distribute a meeting agenda at least two days prior to any scheduled meeting and all participants are expected to review the agenda prior to the meeting. During all project meetings the timekeeper will ensure that the group adheres to the times stated in the agenda.

### Email:

Email should be distributed to the correct project participants in accordance with the communication matrix above. All attachments should be in an agreed upon format. The project lead should be included on any email pertaining to this project.

### Informal Communications:

Any issues, changes or concerns that arise during informal communication between group members should be presented to the project lead as soon as they are recognized, and recorded in team member progress reports.

### Communications:

All external communications (any outside of the project team and regular stakeholder reports) should be developed as part of an External Communications Plan and would follow regular Metro Library practices.

## **Budget Management Plan**

The project lead will be responsible for managing and reporting on the project's cost throughout the duration of the project. The project lead will present and review the project's cost performance during the monthly project status meeting. The project lead is responsible for accounting for cost deviations and presenting the project sponsor with options for getting the project back on budget. All budget authority and decisions, to include budget changes, reside with the project sponsor.

## **Staffing Management Plan**

Project Lead (1 position) – responsible for all management for the project. The Project Lead is responsible for planning, creating, and/or managing all work activities, variances, tracking, reporting, communication, performance evaluations, staffing, and internal coordination with functional managers.

The project lead will negotiate with all necessary Metro Library functional managers in order to identify and assign resources. All staff resources must be approved by the appropriate functional manager before staff members begin any project work.

### Project Team

- Project Lead may delegate work assignments to the Project Team (Teresa Matthews, Abigail Stout, and Judie Matthews). This may include facilitating the move of the DVDs to and from the portable shelving and facilitating the move of the JNF collection to the new shelving with the rest of the library staff.
- Judie Matthews will be the librarian in charge of the JNF collection for weeding and collection maintenance. She will work with the Project Lead and Materials Selection to weed the collection prior to the move and discuss selection needs going forward.

### Staffing Calendar

This project will not require all project team members for the entire duration of the project and levels of effort will vary as the project progresses. The project is scheduled to take approximately two months from the time the materials are ordered until the collection is ready for daily use. Total library staff time required will be approximately 24 working hours to relocate the DVDs and JNF materials. Maintenance and Marketing will also spend time on this project.

Person	Project Phases	Total Hours	Dates
<i>Project lead</i>	<i>Planning: furniture move</i>	10 hours	5/2016-11/2016
	<i>Planning: collection needs</i>	6 hours	9/29/16-11/30/16
	<i>Planning: Requesting quotes</i>	4 hours	9/14/16-11/15/16
	<i>Procurement: Place order for shelves; Schedule delivery and installation</i>	2 hours	11/17/16-11/21/16
<i>Maintenance</i>	<i>Installation: Bring and return portables</i>	1 ½-2 hours	11/1/16-12/15/16 <b>completed 11/1-11/4</b>
	<i>Installation: Move DVD shelving</i>	72 hours	11/1/2016-12/15/16 <b>Completed 11/1-11/4</b>
<i>Project Team</i>	<i>Planning: Weeding JNF</i>	20 hours	11/1/16-11/30/16
	<i>Installation: Move DVDs</i>	6 hours; <b>2 hours actual</b>	11/1/16-12/19/16 <b>Completed 11/1-11/2</b>
	<i>Installation: Move JNF</i>	24 hours	12/23/16-1/3/17
	<i>Review &amp; Assess</i>		5/1/17-6/1/17

## Budget Baseline

The cost baseline for this project includes all budgeted costs for the successful completion of the project. Costs below do not include hours spent by Metro Library staff during any phase of the projects. The only direct expenditures for the project will be procurement of shelving.

Project Phase	Budgeted Total	Comments
Procurement	\$6602	Cost of shelving and end-caps, installation, and moving existing shelving

## Project Objectives

1. The number of checkouts for the JNF collection will increase by 70% by the end of May compared to the same timeframes as for 2016. The percent increase was calculated based on the increase from the highest number of JNF checkouts to the midpoint between that number and the highest number of TNF checkouts. Higher numbers of checkouts will indicate increased member satisfaction with collection – a goal for Collection Anywhere.
2. The number of on shelf browses for the JNF collection will increase by 55% by the end of May compared to the same timeframes as for 2016. The percent increase was calculated based on the increase from the highest number of JNF browses to the midpoint between that number and the highest number of TNF browses.
3. Member retention of Rising Stars and Bright Futures clusters will rise by 1% from January 1<sup>st</sup> to May 31<sup>st</sup>. These are the two clusters that are most likely to be affected by this pilot.
4. The budget for this project will not exceed direct costs of \$8500. Expected costs are:
  - a. Option 1 (Vance Hunt – cabinet box end panels): \$9800 (direct cost of \$7238)
    - i. Marketing, including 6 hours of staff time: \$384
    - ii. Maintenance: \$2178
      1. Staff time @ \$26.01/hr
      2. Relocate 2 tables from 2<sup>nd</sup> floor to 1<sup>st</sup> floor, 2 techs @ 8 hrs: \$208
      3. Bring portable shelving for DVDs, 1 tech @ 2 hrs: \$52
      4. Relocate shelving from 1<sup>st</sup> floor to 2<sup>nd</sup> floor, 3 techs @ 24 hrs: \$1872
    - iii. Vance Hunt (Quote C2 with cabinet box end panels) - \$7238
      1. Steel shelving - \$4370
      2. Cabinet Box end panels - \$2868
      3. Includes installation
  - b. Option 2 (Vance Hunt – Slat wall end panels): \$8692 (direct cost of \$6130)
    - i. Marketing, including 6 hours of staff time: \$384
    - ii. Maintenance: \$2178
      1. Staff time @ \$26.01/hr
      2. Relocate 2 tables from 2<sup>nd</sup> floor to 1<sup>st</sup> floor, 2 techs @ 8 hrs: \$208
      3. Bring portable shelving for DVDs, 1 tech @ 2 hrs: \$52
      4. Relocate shelving from 1<sup>st</sup> floor to 2<sup>nd</sup> floor, 3 techs @ 24 hrs: \$1872

- iii. Vance Hunt (Quote D2 - Slat wall end panels) - \$6130
      - 1. Steel shelving - \$4370
      - 2. Slat wall end panels - \$1760
      - 3. Includes installation
  - c. Option 3 (Demco Interiors) - \$15,233 (direct cost of \$12,671)
    - i. Marketing, including 6 hours of staff time: \$384
    - ii. Maintenance: \$2178
      - 1. Staff time @ \$26.01/hr
      - 2. Relocate 2 tables from 2<sup>nd</sup> floor to 1<sup>st</sup> floor, 2 techs @ 8 hrs: \$208
      - 3. Bring portable shelving for DVDs, 1 tech @ 2 hrs: \$52
      - 4. Relocate shelving from 1<sup>st</sup> floor to 2<sup>nd</sup> floor, 3 techs @ 24 hrs: \$1872
    - iii. Demco Interiors - \$12,671
      - 1. Steel shelving - \$5022
      - 2. End panels (option provided was not comparable in design to Vance Hunt's options) - \$6763
      - 3. Shipping - \$886
      - 4. Does NOT include installation
  - d. Option 4 (Brodart) - \$10,036 (direct cost of \$7474)
    - i. Marketing, including 6 hours of staff time: \$384
    - ii. Maintenance: \$2178
      - 1. Staff time @ \$26.01/hr
      - 2. Relocate 2 tables from 2<sup>nd</sup> floor to 1<sup>st</sup> floor, 2 techs @ 8 hrs: \$208
      - 3. Bring portable shelving for DVDs, 1 tech @ 2 hrs: \$52
      - 4. Relocate shelving from 1<sup>st</sup> floor to 2<sup>nd</sup> floor, 3 techs @ 24 hrs: \$1872
    - iii. Brodart – \$7474
      - 1. Steel shelving - \$4352
      - 2. End panels (slatwall) - \$1370
      - 3. Shipping - \$900
      - 4. Installation - \$834

## Sponsor Acceptance

Approved by the Project Sponsor:

\_\_\_\_\_  
*[insert sponsor's name and title]*

The Metropolitan Library Commission of Oklahoma County

Date: \_\_\_\_\_