

RECONCILING COST AND VALUE IN OUR WORK

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IT'S NICE TO MEET YOU

- Worked at Yale University Library for over a decade in several roles in the Library's IT department
- Fundamental interest and commitment to economizing costs and delivering as much value as possible
- Automation of routine tasks, workflow analysis, leveraging APIs/adhering to a philosophy of systems integration to compensate for gaps within the vendor marketplace or vendor roadmaps
- Culminating into a new role as IT Portfolio Manager and Major Projects Librarian



IT'S NICE TO MEET YOU

- In the 2016 Summer Olympics I Medaled in Over-Thinking (and was an alternate on the Worrying Team)
- I am lunch buddies with failure (pentimenti since we are at RISD)
- Am I an Innovator? Not even close
- I describe myself as the person who helps you descend Mt. Everest
- I naturally fit into the other side of innovation-execution

WHAT DO WE MEAN WHEN WE SAY INNOVATION & EXPERIMENTATION?

- Do you think GLAMs can be innovative?
- Maybe?
- Innovation implies a point of comparison and an assumption of universality
- Being innovative requires a solid understanding of the operational/everyday
- Is innovation in GLAMs more often driven by a need to save costs or increase value?
- Fall in love with the problem, not the solution

LIBRARIANS WITHOUT BORDERS

- Only public library in Guatemala
- School children queuing up to sign in before using library materials
- One hour block of time during the school day
- How to make sign in simpler, faster to provide more active time learning
- 2 Desktop PCs running Windows 2000
- Be cognizant of the extent that money and resources affect your thinking and the solutions we pick to solve problems

WHAT DO WE MEAN WHEN WE SAY INNOVATION & EXPERIMENTATION?

- Do you think GLAMs encourage experimentation and failure?
- Depends?
- Do you think experimentation requires more resources than you have?
- Does your GLAM have any methodology for dealing with failure? Is it ongoing, or after the fact?

YALE UNIVERSITY ARCHIVESSPACE PUBLIC USER INTERFACE IMPLEMENTATION

- Project Ideation and planning began in Summer 2017
- Project Kick-off August 2017
- Expect to Soft-launch the new Discovery Layer for Archives and Special Collections in August 2018
- Full Retirement of former discovery layer by October 2018

Customization Needs and Service Expectation Are High

Low-Risk Tolerance

Significant Existing Investment

Millions of Records Across 10 Repositories

Critical Application Dependencies and Staff Workflows

Technical Debt External Developers Three Time Zones

Nascent Product

Software Development Project(s)

Traditional Product Implementation/Retirement



BEFORE ACTION REVIEW-HOW WE CAN ANTICIPATE COSTS AND VALUE

- What are we trying to accomplish?
- What do we think will change?
- How will we know if we are successful?
- “Roll out a holistic and focused service fully integrated with production”
- “An improved user experience for discovery and access of archival materials”

BEFORE ACTION REVIEW REVIEW-HOW WE CAN ANTICIPATE COSTS AND VALUE

- Express the aging technical environment for archives and special collections at Yale, and they also express our professional and organizational values
- They are aspirational, but still possible, if given the right amount of time
- Keep defining and refining what we mean by “holistic” and “focused.” Those words capture ideas and feelings about what we want, but a PM should break them out into S.M.A.R.T. style steps

BEFORE ACTION REVIEW REVIEW-HOW WE CAN ANTICIPATE COSTS AND VALUE

- An “improved” user experience, leads to a need to examine current metrics on what the user experience is for discovery and access of archival materials. We can’t qualitatively, or quantitatively, measure improvements if we don’t know where we started, and if we don’t define improved

HOW HAVE WE ALREADY FAILED WITH THE PUI?

- Some uneasiness with the original time estimate (June 2018)
- I failed to plan for a delay with one of our external vendors
- Should we have started the project when we did, or waited for more product development to be in place?
- Are we making the PUI too much the same as our current system?
- Varying level of comfort with early-career staff leading some of the project groups

HOW HAVE WE ALREADY ADDED VALUE WITH THE PUI?

- We're pushing the platform forward
- Part of the commitment of open source software--benefits my colleagues, my employer, the entire ArchivesSpace community present and future
- This is in many ways where experimentation and innovation live--someone has to go first
- Early usability tests document our researchers are pleased with the change of interface
- Early accessibility testing makes the platform open to all
- Developing professional network with ULouisville, NC State, Georgia Tech, Michigan State, Harvard

PROJECT, PROGRAM, AND PORTFOLIO MANAGEMENT

- Plato's Ship of State metaphor postulates, "A true pilot must of necessity pay attention to the seasons, the heavens, the stars, the winds, and everything proper to the craft."
- Accounting for all possible variables, risks, pluses, and minuses is also the mainstay of project management
- Is this applicable to all GLAMs? Or is it large organizations only?
- Everyone should know their assets, debts, and *your* problem set

WHAT DO I MEAN WHEN I SAY PROJECT MANAGEMENT?

Portfolio Management: Next Practice

Goal/Effort Alignment, Total/True Cost of Ownership, Scheduling, Strategic Planning

Program Management: Best Practice

Oversight of a Key Business Area with Active Projects and Production Services, Product Sustainability, Prioritization, Risk Management

Project Management: Standard Practice

1:1 Management, Scope, Requirements, Project Readiness Checklist, Technical Specs, Deliverables

ARE GLAMS WATERFALL OR AGILE?

- We want to be agile in our work, but much of our thinking and planning and budgeting is waterfall, producing a bit of dynamic tension between these two models
- GLAMs remain largely reactive to the marketplace
- We customize more than develop products
- GLAMs value consensus, distributed, often conservative decision making
- GLAMs manage the historical past and love to imagine the future 50 years ahead
- The “pilot” may be the most frequent attempt to examine a new idea/service, but pilots also become permanent-permanent pilots or permanent production service

PROJECT/SERVICE LIFECYCLE

- Selection/Acquisition
- Development
- Implementation
- Assessment
- Major Enhancement/Retirement

DISCUSSION POINTS

1. How does your GLAM define cost?
 1. How do you cost out your work?
 2. Operational budget?
 3. Major purchases/external invoices?

DISCUSSION POINTS

1. How does your GLAM define/determine value?
 1. “Is it good for our patrons?”
 2. “Does it support the University’s mission of teaching and learning?”
 3. Anything more than that? Is our value only in a supporting role?

DISCUSSION POINTS

1. Do you report or evaluate cost and value more than once a year?
2. Do you focus your conversations about cost and value on what you do, or also on how you do it?

SOME WAYS WE CAN WE ACHIEVE GREATER VALUE AND MONITOR COST

- Brainstorm for questions not answers
- Remember “How we do” is as important as “What we do”
- Think about a product or service’s expected shelf life-in the marketplace and in your GLAM
- Try to define the business value of each project in measurable terms, before it moves from stage to stage of the project lifecycle
- Pre-defined decision criteria, before any emotional bias sets in
- Pre-defined check-in milestones and variance reports
- Always begin with an exit strategy