Introduction

In the following article “Serendipity of the Hats,” Curtis Michelson discusses a poster presentation at the 2018 Charleston Conference poster session* that really “jumped out” at him. The poster was entitled “Scrumming the Library Materials Budget” and Curtis was intrigued by a specific word in the title.

The word “scrumming” is more associated with software and app development than libraries, so naturally, he wondered what was going on. Curious to get the full story, Curtis decided to interview poster presenters Raimonda Margjoni and Michelle McClure, librarians in the Acquisitions and Collections Services Department at George A. Smathers Libraries at the University of Florida.

In “Serendipity of the Hats,” Curtis shares what he learned about how Raimonda and Michelle along with their colleagues in the A&S Unit used the Scrum framework from the “Agile” project management system to make sense of the intricate process of developing the annual materials budget allocation. It’s a fascinating story of how a team of innovative librarians recognized how skills developed for another discipline could be applied to successfully managing library workflows. — Tom Gilson, Associate Editor, ATG and Director of the Charleston Conference Poster Session

At Charleston 2018, there were some really great poster sessions. But one poster in particular jumped out at me. It was titled “Scrumming the Library Materials Budget.” “Scrumming” is not a verb one hears every day, unless you’ve worked with software development teams and you are native to their specialized mumbo-jumbo with words like “sprints,” “scrum,” “standups” and other terms common to their “agile” approach to app building. So, how did two curious library professionals from the University of Florida get exposed to this Agile language and how did they apply agile project management and agile product development approaches to library budgeting?

“It was complete serendipity finding agile for the library” said Raimonda Margjoni and Michelle McClure from University of Florida’s George A. Smather’s libraries.

In “Serendipity of the Hats,” Curtis shares what he learned about how Raimonda and Michelle along with their colleagues in the A&S Unit used the Scrum framework from the “Agile” project management system to make sense of the intricate process of developing the annual materials budget allocation. It’s a fascinating story of how a team of innovative librarians recognized how skills developed for another discipline could be applied to successfully managing library workflows. — Tom Gilson, Associate Editor, ATG and Director of the Charleston Conference Poster Session

---

* Raimonda Margjoni and Michelle McClure in front of their poster session. [Image: Raimonda Margjoni and Michelle McClure in front of their poster session.]

---

**Serendipity of the Hats**

A Serendipitous Application of an Agile Project Management Framework

---

**Introduction**

To ensure full payment of fiscal year material expenditure commitments, along with a timely budget rollover in order to develop an accurate budget allocation for the next fiscal year.

**Our Approach**

At end of Q3, 76.44% of Electronic Resources budgets were committed.

- **Q4 Strategies – Year End Processes**
  - Ensure YTD payment activity recorded in E-Resources Tracker
  - Identify unpaid Electronic Resources and unpinned funds
  - Communication and collaboration
  - Ensure full payment on commitments

---

**E-Resources Tracker Review**

- Title / feature (new, cancellations, transfers)
- Invoice line item amounts
- Recorded figures versus FY budget commitments verified against OL and accrue reports

---

**Unspent funds on E-Resources - 24%**

- Create time line to expedite decision
- Distributed to Electronic Resources librarians
- Requested payment status

---

**Year End Deadlines Released**

- Invoices received and processed
- E-Resources Tracker updated
- Budget prepared for Fiscal rollover

---

**Agile – Scrum Training**

- Introduction to Agile project management
- Expanded training on Scrum framework

---

**Future**

Intentionally implement the Scrum framework to better organize budget management and increase efficiency.

---

**Vision**

- An Agile project management framework
- Provides structure for timeline and deliverable/prioritized product delivery
- Utilizes sprint feedback sessions and collaborative decision making
- Allows for ongoing modifications as opposed to the linear Waterfall project management

---

**Source:**

“Serendipity — how so?” I asked. Thus, began my interview with the duo. The serendipitous moment came when Raimonda first saw an email sent to library staff early last year for “learning agile” and it was being offered, of course, at the library. They signed up.

The course they took was offered for free at the Marston Science Library in two sessions over two days by one of the school’s professors Dr. Benjamin Lok and an instructional designer Margeaux Johnson — part 1: Agile in general and part 2: Scrum. For Lok, it was sort of a “give back.” He is a tenured professor, with a PhD in computer science from UNC, and the creator of patented VR technology that helped launch one of Gainesville’s entrepreneurial success stories — Shadow Health (https://www.shadowhealth.com/).

Today, Lok balances his time researching and teaching and helping research future markets for the business of his company. But providing free courses on agile and scrum to his alma mater feels right. In fact, he actively develops agile curriculum. One of the most popular courses is “VR for Social Good” in which the emphasis is on developing empathy, for teams to self-organize and work in small increments showing their work every two weeks. Everyone stays on their toes because each team must demo at the end and receive 360 degree evaluations from their peers.

As a sometimes teacher of agile methodologies myself to software teams, I was curious to hear the librarians’ impressions. The classes were less theory and more practice. They engaged in a variety of exercises and games to illustrate classic mandates of agile team collaboration — limit work-in-process to get focus, re-orient conversations around value (outcome, instead of output), be transparent, make your work visible to everyone, do just enough research instead of all upfront check-in with your team every day. These classic agile principles were codified for the software community into a manifesto (https://agilemanifesto.org/) back in 2001. It has been translated into 63 languages and boasts millions of signatories. For more about agile and scrum, see: http://bit.ly/history-scrum.

As Raimonda and Michelle described to me what they learned in the course and how they decided to apply it to their library budget context, I was struck both by their enthusiasm and their humility. “I don’t claim to know anything,” says Raimonda, “but the whole framework for collaboration just made sense.” When I ask Michelle in particular what seemed most apropos to library budgeting, she said “the ability to adapt and to take work in increments and share it with the team.”

How did they actually apply scrum techniques to their budgeting team processes? They work in the Accounting & Serials (A&S) Unit of the Acquisitions and Collections Services (ACS) Department, specifically supporting the library’s materials budgets; essentially, the process of developing annual materials budget allocations. That process begins each year at George A. Smathers in the November-December timeframe with inputs from the prior fiscal year’s final budget and culminates as expenditure commitments increase in a finalized fiscal year budget. Since the majority of the materials budget is allocated and spent on continuing e-resources (87%), they must insure all prior commitments on e-resources are paid and essentially all rows and columns add up before they can begin the next fiscal year.

I asked what might be an example of how they improved their process with the inspiration from scrum and agile. “In the past, we would have rushed to clear up all the invoices with unspent funds but the process was random and ad-hoc,” said Raimonda. By putting a discipline together and visualizing their work on large boards around the office and communicating with re-occurring weekly touch-base meetings amongst themselves and with the E-Resources Unit, work in flight was much easier to allocate and answers easier to chase down. The revised process naturally forced a new pattern of communication, with every few days seeing some impromptu status updates from vendors. With the just-in-time information, they continually re-adjust their plan. Continually adapting to changing circumstances is the very definition of agility. Bravo!

When I asked Raimonda and Michelle for a recent example of how this played out in practice, they described a commitment the

About the Charleston Conference Poster Session

The 2018 edition of the Charleston Conference Poster Session more than lived up to the high standards set by past sessions. Presenters took advantage of the opportunity to describe new programs, demonstrate practical problem-solving, discuss innovative methodologies, and report the results of recent research. Showcasing a total of 36 posters, the 2018 poster session dealt with topics of interest ranging from data analysis to the role of subject liaisons and from international copyright to discovery and access. The hour-long session drew 250-300 attendees who took advantage of the opportunity to visit with poster presenters, discuss their work and ask questions while enjoying refreshments and a cash bar.

Added to that, in an adjacent room, virtual posters — PDF poster images — of many of the posters were displayed on large flat screen monitors at six viewing stations. Attendees were able to examine these virtual posters in detail and send themselves copies of favorite posters and contact the presenters directly via email. After the conference all the virtual posters are accessible by clicking the “Past Conferences” drop down menu on the Charleston Conference homepage (https://charlestonlibraryconference.com/).

It is easy to see why the poster session has proven to be one of the most popular events held during the Charleston Conference. So, if your library has developed an innovative program, a new service, or a unique problem-solving solution, consider submitting a poster proposal for the 2019 Charleston Conference poster session. Who knows, you may find yourself chatting with Curtis as he plans to praise your efforts in a future article.

What is Scrum?

Scrum is one of several project management and collaboration methods that software teams invented over the past few decades to improve their ability to go from idea to finished good. Scrum in particular was one of the solutions to the perennial problem of bridging the communications gap between business people and technical teams. Today scrum is more than about being efficient and agile. It is a framework that provides a way to manage large-scale projects and scale those efforts to the enterprise level. It is a way to manage a project that is iterative in nature and allows for changes in scope and direction to be handled effectively. Scrum is a framework for managing software development projects, and it is based on the agile methodology.

As a Scrum team, the project is divided into sprints, each of which is typically two to four weeks long. During each sprint, the team works on a specific set of tasks, called a backlog, which is prioritized by importance and urgency. The team meets daily to review the progress made on each task and to plan the work for the next day. At the end of each sprint, the team presents its work to the stakeholders, who review the progress made and provide feedback.

In Scrum, the product owner is responsible for defining the product backlog, which is a list of all the work that needs to be done. The product owner also helps to prioritize the tasks on the backlog and ensures that the team is working on the most important tasks.

The Scrum master is responsible for ensuring that the team is following the Scrum methodology and for resolving any issues that arise. The Scrum master also helps to coach the team and to make sure that they are working effectively.

The team in Scrum is comprised of cross-functional members, who are responsible for delivering the final product. The team is self-organizing, which means that they are responsible for making decisions about how to work and what tasks to work on.

In Scrum, the sprint planning meeting is held at the beginning of each sprint to set the goals and priorities for the team. The team members work together to create a plan for the sprint, which includes the tasks that they will work on and the estimated time required for each task. This planning meeting is an opportunity for the team to discuss their work and to ensure that they are all working towards the same goal.

The daily stand-up meeting is held each day during the sprint to review the progress made on the tasks. During these meetings, the team members share their progress and any impediments that they are facing. The team also discusses any changes in the plan and makes adjustments as necessary.

The sprint review meeting is held at the end of the sprint to review the work that has been completed. During this meeting, the team members present their work and discuss any lessons learned. The sprint review meeting is an opportunity for the team to reflect on their work and to plan for the next sprint.

The sprint retrospective meeting is held at the end of each sprint to review the process and to identify ways to improve. During this meeting, the team members discuss their experiences, identify areas for improvement, and set goals for the next sprint.

In Scrum, the goal is to deliver a working product at the end of each sprint. The team is responsible for delivering the product and for ensuring that it meets the requirements of the stakeholders.

University had with a society publisher who had (unbeknownst to the library) switched from self-publishing to working with a major publisher. Adding to the confusion was the fact that the library already subscribed to a journal package from that publisher but this material was not included. In this scenario in the past, the subscription to this material would not have been auto-renewed, just dropped and online access lost. And it would have resulted in the publisher not getting paid and disgruntled emails passing back and forth between professors and the library. There was a budgetary impact too. With transfer to the major publisher, the cost of the subscription increased by 85%. It took the whole team a
lot of communication to chase it all down, but if you look at their beautiful workflow graphic (see page 69), the advantage to working in more like a scrum workflow was the intensified collaboration with their stakeholders and the timely budget updates shared across their team. “Our success depends on the timely responses of 3rd parties, it’s the nature of renewals” said Michelle. I told them that an old saw in the agile community is scrum doesn’t solve your problem, it shines a bright light on your problems. “Exactly” they said.

Raimonda and Michelle are not alone. Many are experimenting with agile in their part of the business now. But I must candidly admit, in my travels around libraries and higher-ed, these two appear to be pioneers, certainly some of the early adopters. Various industries, including higher education, are testing out agile principles for all kinds of knowledge work. Agile procurement. Agile Budgeting. Agile Marketing. There is a global “Agile Beyond IT” conversation and of course an associated hashtag #AgileBeyondIT (try it on Twitter). To see one of the most developed sites on the web explaining in beautiful detail the full flowering of agile beyond IT, check out the Business Agility Institute (https://businessagility.institute/).

Friends, the moral of this story is, if you see a flyer on your campus about agile, grab it. Or more to the point, and in the spirit of agility, reach out to your colleagues and ask them the curious question, “are there some ways we can use agile or scrum in our library to solve a ‘wicked problem’ or two?” In other words, how can you use these tools for solving problems that are complex in nature and don’t admit of linear solutions that can be defined upfront and simply executed?

Heck, if you want to explore that kind of question with colleagues at the Charleston Conference this year, come check out the pre-conference session called “Hacking The Library” where you’ll meet peers asking similar questions and we will provide, among other things, some agile techniques to take back to your library and start experimenting with or hacking your rapidly evolving future.

*While Curtis was understandably impressed by the efforts of Ms. Margjoni and Ms. McClure and their poster “Scrumming the Library Materials Budget,” he also notes that it was only one among “some really great poster sessions posters.” Curtis is spot on.*