REFRAMING FAILURE

Post Mortems for Library Projects

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By the end of this session, attendees will be able to...

● understand the purpose and value of post mortem analyses for library projects;
● identify steps associated with planning for, conducting, and communicating the results of a post mortem analysis;
● consider how to scale post mortems for individual and team-based projects; and
● develop a post mortem analysis plan for a past or current project upon returning to their home libraries.
How many have been part of a library project that has either failed or could have been executed better?
How many set aside time to figure out what went wrong in those projects?
What is a post mortem?

A post mortem is a method for transforming tacit knowledge, insights, and experiences about a present or past project into actionable goals for future projects (Desouza, Dingsøyr, & Awazu, 2005).
Who uses post mortems?

- Developed in software engineering industry.
- Underutilized even in the industry in which they were developed (Schroeder, 2013).
Why perform a post mortem?

- Allows managers to reflect on their approach; teams, to reflect on their collaboration and coordination; and organizations, to capture and make available project insights to the whole organization (Desouza, Dingsøyr, & Awazu, 2005).
- Facilitates dialogue and perspective sharing between team members, documents successes and failures, and promotes job satisfaction through constructive feedback (Birk, Dingsøyr, & Stalhane, 2002).
- Allows you to communicate when project failures are traceable to events or elements you have no power to circumvent or mitigate.
Aren’t post mortems the same as assessment?

Assessment asks...

Did we accomplish our goal(s)? To what degree?

Post mortems ask...

How well did we accomplish our goals? What went right? What went wrong? Why?
How do I perform a post mortem?

- No right way to perform a post mortem analysis.
- Depends upon the time, personnel, & cost you are willing and/or able to dedicate to conducting and disseminating a post-mortem analysis.
- Several models exist.
- We will focus on three that can be done at small to medium size organizations.
Collison and Parcell’s (2001) 12-Step Model*

Call the meeting.
Invite the right people.
Appoint a facilitator.
Revisit project objectives.

Revisit project plan.
What went well?
Why? How does this inform future projects?
What could have gone better?

What were the difficulties?
Participants should feel heard.
What next?
Record the meeting.

<table>
<thead>
<tr>
<th>Project Survey</th>
<th>Collect Objective Information</th>
<th>Debriefing Meeting</th>
<th>Project History Day</th>
<th>Publish the Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create and distribute a survey about the project to all project participants.</td>
<td>Use the success metrics (cost, quality, time, etc.) you set prior to project to capture data at the beginning, middle, and end of a project.</td>
<td>Provide participants with an opportunity to provide direct feedback. Select a chair, coordinator, and facilitator for the meeting.</td>
<td>Should be limited to those with the deepest knowledge of and involvement in the project. Establish a problem statement and review both participant feedback and objective information guided by the problem statement.</td>
<td>Publish as an “Open Letter to the Project Teams.”</td>
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Birk, Dingsøyr, and Stalhane’s (2002) 3-Phase Model

### Preparation

A facilitator and one or more members of the team recaps the project and determines a goal for the post-mortem.

### Data Collection

Gather all relevant project experiences. Could obtain through semi-structured interviews, facilitated group discussions, and/or KJ sessions.

### Analysis

Facilitators solicit feedback as to whether the analysis team has understood participants. An Ishikawa diagram is used to identify root causes of positive and negative experiences. Results are compiled in a PMA report.
KJ Sessions

Project: Website Usability Study

Too many clicks.

Ineffective guidance.

Subject grid too big.

Printing services not indicated.

iPad & laptop loan unclear.

FAQs not visible.

Research help ineffective.

Reserves policy is unclear.

ILL ability unclear.
KJ Sessions

Project: Website Usability Study

FAQs not visible.
Research help ineffective.
Reserves policy unclear.
Library Resources

Subject grid too comprehensive.
Ineffective guidance.
Subscription Databases

Too many clicks.

iPad & laptop loan not clear.
Printing services not indicated.
Library Services
Website not promoting services and resources.

Research Help
- Library guides not promoted.
- Unaware of printing services.
- FAQs not visible.
- No streaming video.
- Research chat unclear.
- iPad & laptop not promoted.

Guidance
- ILL & CLICS misunderstood.
- Academic Search Complete on most pages.
- Text verbose.
- Description too long.
- A-Z list in each page.
- Students misused site search.
- Too many clicks to find articles.
- Too many hyperlinks on homepage.

Header Menu

Free Space

Academic Search Complete on most pages.
<table>
<thead>
<tr>
<th></th>
<th>Lessons Learned</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td><strong>New approach to database display.</strong></td>
<td>Having Academic Search Complete as the first option is not effective in each subject page.</td>
</tr>
<tr>
<td>02</td>
<td><strong>Less is more.</strong></td>
<td>Since users navigate websites quickly, the less text or description the better.</td>
</tr>
<tr>
<td>03</td>
<td><strong>Modern website header and menu is needed.</strong></td>
<td>While users need a structured header menu, designers can use images for promotion.</td>
</tr>
<tr>
<td>04</td>
<td><strong>Less clicks are needed.</strong></td>
<td>The library’s most used resources and services should be a click away and not buried.</td>
</tr>
</tbody>
</table>
Post mortems are only effective if they are used.
Formats suggested by the literature include
- the open letter,
- the report, and
- the story.
Open Letter to the Project Team

Collier, Demarco, and Fearey (1996) suggest distributing the results of a post mortem analysis in the form of an “Open Letter to the Project Team.”

The Open Letter should include the following elements:

- a description of the project,
- a description of “the good,”
- a description of “the bad,” and
- a description of “the ugly.”
Birk, Dingsøyr, and Stalhane (2002) suggest distributing the results of a post mortem analysis in the form of a post mortem analysis report. The post mortem analysis report should include the following elements:

- a description of the project,
- a description of the project’s problems (with Ishikawa diagrams),
- a description of the project’s successes (with Ishikawa diagrams), and
- a meeting transcript.
Desouza, Dingsøyr, and Awazu (2005) suggest that for certain types of projects, distributing the post mortem analysis in the form of a narrative is most appropriate.

A post mortem narrative may be appropriate if the project is:

- novel in nature,
- of significant magnitude, and
- the resulting post mortem is intended to convey norms or core values of the organization.
According to Desouza, Dingsøyr, and Awazu (2005), one should consider the following when deciding between communicating the results in a report format or a narrative format:

- Structure
- Cost
- Context
- Comprehension
- Memorability
Collier, DeMarco, and Fearey (1996) suggest

- storing post mortems in a repository accessible to all team members,
- tagging lessons learned according to functional area/process and assigning each person an area to review and report on as it relates to the new project,
- presenting the results of the postmortem to management, and
- assigning someone in the organization a lesson learned and responsibility for implementing change relating to that lesson learned.
“Postmortem analysis is only of value if insights are engaged to guide future project management efforts” (Desouza, Dingsøyr, & Awazu, 2005, p. 204).

What will be the goal of your post mortem?

How will you collect data for the post mortem?

How will you make your post mortem findings available?

Who will be part of your post mortem at each stage?

How will you communicate the findings of your post mortem?

How will you ensure that existing post mortems are consulted?
If you’d like to get in touch with us, we can be reached at...

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