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# Practicing intentionality in team and project work

Vacek, Rachel; Burkhardt, Heidi

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# Practicing intentionality in team and project work

**Rachel Vacek**

Head, Design & Discovery  
University of Michigan  
@vacekrae

**Heidi Burkhardt**

Web Project Manager & Content Strategist  
University of Michigan  
@heidi\_sb

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Hello! I'm Rachel Vacek, Head of Design & Discovery and <Heidi introduces herself>. We both work in Library IT at the University of Michigan Library, and we're here today to talk to you about practicing intentionality in team and project work.

# Outline

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Introduction

Strategies

Being a model



Website Redesign  
DEIA Statement:

<https://umlib.us/wr-deia>

Rachel - 5 minutes

First, I'm going to provide some context about who we are and why we created a statement about how principles of diversity, equity, inclusion, and accessibility inform and accompany the stages of our website redesign project.

Next, Heidi will then dive into the many tangible strategies she's using as the project manager for the Website Redesign Project and will highlight the areas where DEIA was manifesting in the structure of and our approach to the project.

And finally, I'll talk about how our DEIA statement and the strategies Heidi outlined have become a model for other projects in the library.

Also, on the right side of the screen you'll see the link to the DEIA Statement that we'll be talking about today ([umlib.us/wr-deia](https://umlib.us/wr-deia)). We consider it a living document and contribute as project work continues. Also, it contains links to our staff intranet, which is internal. We'll provide the link to it again at the end of this presentation.

# Introduction

# Web Presence Steering Committee

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Steward and champion a clear vision for the library's public facing web presence

A parent committee to teams that oversee:

- Library's main website
- Web content and governance
- Intranet
- Discovery tools and access

The Web Presence Steering Committee was formed in early 2018 to address the need for improved web governance. It has direct responsibility for managing the web applications (not necessarily the service) connected to library website, and provides stewardship for the experience layer across the entire web presence. To fulfill this responsibility on a project and operational basis, it is the parent committee for teams that oversee:

- The library's main website, and the dozens of sites and services that integrate with it
- Web content and web governance
- The Intranet
- Our discovery tools, ways to improve access to resources, and Library Search

A decade has elapsed since the launch of the library's current website. During that time, user needs and expectations for research, teaching, and learning have evolved significantly, and technology has greatly changed. In Summer 2018, the WPSC charged the Website Redesign Project Team, with Heidi as the project manager.

# Website Redesign Project Team

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Make the thing

## The redesigned site will:

- Invite and connect with our users
- Enable user engagement with the full breadth of resources that our library offers
- Adhere to current and emerging standards for accessibility and user experience
- Align with efforts to transform physical spaces

The Website Redesign Project Team kicked off in July 2018. There are 11 people on the team from three different divisions in the library, including Operations, Communications and Marketing, and Library IT.

There are many goals for the redesigned site. will:

- Invite and connect with our users
- Enable user engagement with the full breadth of resources that our library offers, including services, spaces, expertise, and collections
- Adhere to current and emerging standards for accessibility and user experience
- Align with efforts to transform physical spaces. Doing this will allow users to understand the library holistically.

WPSC's role in supporting the project has been to provide support, assist with decisions and setting priorities and timelines, and to coordinate communication about the redesign from a high level to the library and campus community.

## Why we developed our DEIA Statement

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Espouse and elevate principles of diversity, equity, inclusion, and accessibility in our work

### Why:

- Received constructive criticism about lack of diversity in teams
- Accessibility, user research, inclusive language, etc., was built into the project from the beginning
- Attention to committee formation and approaches was mixed

As part of the communication strategy for the Website Redesign, Alexa Pearce and I, as the co-chairs for the WPSC, began strategically giving presentations to various groups in the library. In December 2018, we gave a 30-minute presentation to the entire library. The presentation itself was well-received, but we received some constructive criticism from our colleagues in the week after the presentation. The feedback was about the lack of diversity on the project team, and the perceived lack of diversity in the snapshot of the personas that were created and being used with the project.

We knew that accessibility had been baked into our plans from the beginning. The project team had been doing extensive user research with diverse groups on campus. We also knew that our content style guide for the website used inclusive language. We needed a better way to communicate our efforts, as well as demonstrating efforts going forward, were taking into consideration DEIA principles.

This prompted some reflective and somewhat difficult conversations at our next several WPSC meetings.

## Considerations

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Document and share our general approach to elevating DEIA principles and ensure they inform and accompany all stages of a project

### Questions we asked ourselves:

- How should we engage with the criticism we received?
- Not all diversity is visible, but is this an adequate response?
- How do we avoid tokenism?
- How do we adjust within existing limitations?

We knew that we didn't want to be defensive. Instead, we wanted to engage with the criticism and recognize its validity. We were also very aware that not all diversity is visible. And we definitely wanted to avoid tokenism.

But when we had originally discussed team formation for the Website Redesign Project, we thought overwhelmingly about each member's role and representation in terms of job function, expertise, department, location in the organization, etc, as opposed to specific focus on diversity and inclusion.

We recognized the limitations we have in our library, but all our conversations prompted us to think about what we could do to engage with the criticism we received. Alexa and I also talked with Jeff Witt, our library's Diversity and Inclusion Specialist. We decided to create a DEIA Statement that would document our general approach to elevating DEIA principles. We could show how we're thinking about DEIA in the administrative components as well as in the content and substance of the website redesign project.

And having a DEIA Statement would be easy to share with library staff and users alike. It demonstrates how we are practicing DEIA intentionality in all the stages of our project work.

## DEIA Statement - Outline

- Statement Purpose
- Team Structure and Engagement
  - Team Norms and Project Charter
  - Diversity of Membership
  - Inclusive Communication: Internal Focus
- User-Focused Methods and Practices
  - User Research and Usability Testing
  - Persona Development
  - Accessibility for Everyone
  - Inclusive Content
  - Equitable Access
- Resources

What's in the actual DEIA Statement? Here's an outline. We broke it up into 4 sections:

- Statement Purpose
- Team Structure and Engagement
- User-Focused Methods and Practices, and the
- Resources we referenced

Now I'm going to turn it over to Heidi.

# Strategies

Heidi - 7 minutes

Thanks, Rachel. Now that y'all have a bit of context, I'm going to talk about some of the tangible strategies we use as part of our project work. Contributing to the statement was an opportunity to reflect on how diversity, equity, inclusion, and accessibility were manifesting in our approach to the project and the structure of our team. But the process has also made me become more intentional.

# Project management for humans



My favorite book about project management is Project Management for Humans by Brett Harned. While it covers details of how to manage projects and has tons of useful guidance in it, the overarching ethos of the book is people before process. That is very much how I operate as a PM. I take time to learn how the people on the team want to work together and communicate, and establish shared understanding and expectations that we check back in on. I also position myself as a person team members can always come to with questions, sticky problems, or conflicts. This is really important for practicing inclusivity and building trust.

# Project Charter and Team Norms

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What we're working towards and how we'll get there together

## Includes:

- Overview of the project
- Team structure, team members and roles
- Communication and meetings
- How we track our work
- Shared values

A primary way this approach manifests is in our project charter and team norms. You'll see them called operating agreements sometimes. And I cannot emphasize enough how taking the time to do this can shape the tone of team or project.

For this team and project, I took an initial pass using a template so we had something to start with and shared it in advance of our kick-off meeting for everyone to review and comment on it on their own. When we came together for the first time, we heavily focused on working through it as a team.

- The charter provides an overview of the project with the sponsor, brief description pulled from our charge, the high level deliverables and projected deadlines, and the key stakeholders
- It also lays out our team structure, who the members are, and what their roles are. Being clear about role expectations up front is super important
- Communication and meetings is where the norms part comes in. This is where we say how we communicate in terms of the tools we use, expectations around communicating with each other, and how often we meet. We check in on this regularly to make sure it's working. In the first 6 months or so, we made a number of adjustments
- How we track our work is "where do we put all those documents and lists". But it's shocking how often people assume what will work best and don't even have a conversation

- Shared values were a desire expressed by members of the team, so we added them and I'm so glad we did. We've added to the original list, and check-in on them every single time we meet as a group to make sure we're staying true to what we agreed to. This is also a space where folks feeling like they come to me individually is important.

Having this guiding living document has been essential to our project and I hope that it fosters an equitable, inclusive atmosphere on our team

## Internal communication strategy

Build trust and promote transparency throughout the organization

### Methods:

- Use a variety of communication channels
- Practice awareness of frequency
- Leverage informal networks with intentionality
- Embrace change management best practices

Everything with the project charter and team norms is specific to the team executing the work, but this is a project important to the entire library, so we have also been strategic and thoughtful about how we approach internal communications. We want to show we are being strategic and thoughtful and promote transparency in order to build trust.

- We have a variety of channels in the library (newsletter, all staff emails, presentations, sharing reports and documentation through our intranet) and we consider the best times to use each one
- We practice awareness of the frequency of our messaging. Our goals for communication is to show our momentum and reassure folks we're on track without overloading them
- One of my favorite things we've done is recognize there are informal communication networks in our organization and are experimenting with intentionally leveraging them. The WPSC charged a Website Champions group and we recruited members from across the org. It's a fairly informal commitment and I meet with them every other month or so to fill them in on the project. This brings folks in, provides an outside perspective, and in turn the Champs can be our little birds to help bubble up conversations happening in different corners of the organization
- We are also very deliberate about embracing change management best practices. When we released our staff preview earlier this summer, we aimed to be clear about what control and influence folks had, as well as the scale

- and pace of the project. This means being explicit about what's changing, what's not, and what people need to do (even if it's nothing)

# Assessment is DEIA work

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Integrating DEIA principles in how we measure success

## Metrics include:

- Usability
- Accessibility
- Mobile experience
- Site performance

We wrote an assessment plan early in the project. Integrating DEIA principles in how we measure success was happening, but in contributing to the DEIA statement I found articulating the connection very powerful. So I heartily encourage thinking about diversity, equity, inclusion, and accessibility as you consider how will assess any given project.

For our website redesign, we have seven metrics we're assessing against and four are particularly relevant here: usability and accessibility, as well as mobile experience and site performance. For the latter two, we are aware that not all of our users have access to high speed networks, wi-fi, or smartphones. So it's important that our site is built with modern technology solutions that enable quick page loads, and works with a variety of devices and web browsers.

## User research approach

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Build empathy for and capture the diversity of our community, both users and staff, through research and testing

### Methods:

- Conduct studies to learn about needs across a range of backgrounds and use cases
- Use a variety of recruitment strategies
- Develop persona groups

And finally, feeding off the connection to assessment is how heavily user research and experience are integrated into our project. And I'd like to acknowledge our Senior UX Specialist Robyn Ness for her leadership and vision. Through our user research approach, we aim to build empathy for and capture the diversity of our community, both users and staff, through both research and testing. With this, we:

- Conduct studies to learn about needs across a range of backgrounds and use cases. Our work includes broader studies around top tasks by audience, as well as testing the site's architecture and specific designs
- Use a variety of recruitment strategies, including tabling and intercept testing in different campus buildings, as well as using Optimal Workshop (which we are very fortunate to have access to), to scale our testing beyond what we can do in person.
  - We work with our Assessment Specialist for sampling and also recruit directly through our Office of Services for Students with Disabilities, a relationship my colleague Ben Howell (who is here at IDEAL) has cultivated over the last four years
- Developed persona groups demonstrating the multi-layered, intersectional ways folks experience our University. Instead of Joe Undergrad, we broadly describe the group and the variety of elements that may play into an individual's experience

I'll now pass it back to Rachel who will talk a bit about how this work is becoming a model for the rest of our library.

# Being a model

Rachel - 3 minutes

Thanks, Heidi.

## Sharing the DEIA Statement

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Seek out expertise, be open to feedback, and strive for transparency

### What we did:

- Sought feedback from Diversity and Inclusion Specialist and Accessibility Specialist
- Shared with Library Diversity Council and Digital Accessibility Team
- Held Brown Bag in May 2019

So after we created the DEIA statement, and described how DEIA principles were manifesting in the structure of and our approach to the Website Redesign Project, we felt it was important to get additional feedback from some local experts. We shared our document with Jeff Witt, the library's Diversity and Inclusion Specialist whom I mentioned previously, as well as Stephanie Rosen, the library's Accessibility Specialist. Their unique perspective and feedback was incredibly valuable in honing language and the ideas we were trying to convey.

We also shared the statement with the Library Diversity Council, and the Digital Accessibility Team. (Some of you may have heard Ben Howell and I talk yesterday morning about this at "Transforming Library Culture with a Digital Accessibility Team.")

In May as part of our Library's month-long celebration of DEIA, we held a brown bag and invited discussion and feedback on the statement. We also discussed if people in the room were interested in their teams documenting DEIA considerations for the approach to and substance of their work.

## Being a model

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Practice intentionality in elevating DEIA principles when creating teams and doing project work

Who's adapting the approach in our library:

- Deans' Office
- Library Service Design Program

These conversations from the Brown Bag helped to generate a lot of interest throughout the library, not only in using the DEIA statement as a model, but in applying many of the strategies Heidi just outlined, all to help elevate DEIA principles in the creation of teams, and in making project plans, communication plans, assessment plans, etc.

A few groups in the library are using our statement (and our approach to practicing intentionality) as a model for creating large project teams for big change initiatives.

For example, the Deans' Office -- which includes HR, Marketing & Communication, Development, Finance, Diversity, Project Management, and Assessment -- is looking at adapting this for some upcoming major initiatives.

The Service Design Task Force, of which I am a member, is in the process of drafting a DEIA Statement for the library's new Service Design Program. The program consists of a suite of **expertise, tools, and services** that enable the generation of new ideas and solutions for the challenges and opportunities faced by staff and the university community. Our goal of developing a statement:

- Is to ensure that DEIA principles inform and accompany how we operate as a team
- Is represented in all stages of the Library Service Design Roadmap
- Is in the services the Program offers to the library community

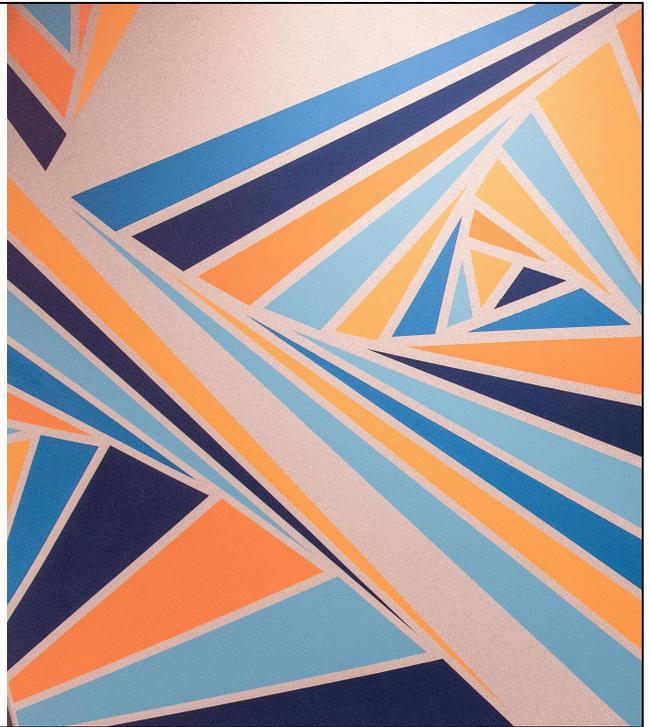
# Thank you for being here!

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**Rachel Vacek**  
[rvacek@umich.edu](mailto:rvacek@umich.edu)

**Heidi Burkhardt**  
[heidisb@umich.edu](mailto:heidisb@umich.edu)

**Website Redesign DEIA Statement:**  
<https://umlib.us/wr-deia>



Thank you for being here! We hope this presentation has provided you with transferable strategies for inclusive project management, as well as building trust and adaptability within your organization.

We believe that the integration of DEIA principles into a project can be impactful and can serve as a model for project teams for how to work together and consider one another.

Here's our contact info as well as the link to the DEIA Statement for our Website Redesign Project.

What questions do you have?