PROJECT CHARTER

1. General Project Information	
Project Name:	**TexShare Usage Statistics: Data Processing and Reporting Tool**
Project Sponsor:	**Danielle Plumer**
Impact of project:	Increase the availability and awareness of TexShare Databases usage data

2. Project Team				
	Name	**Department**	**Telephone**	**E-mail**
Project Manager:	Kate Reagor	LDN		kreagor@tsl.texas.gov

3. Stakeholders
Resource Sharing Team, Library Development & Networking Division of the Texas State Library & Archives Commission
Library staff who participate in the project survey and/or project focus group(s)

4. Project Scope Statement
Project Purpose
The goal of this project is to speed up the processing and storing of consortia-level usage reports for the TexShare Databases e-resources, so that this information can be made available at the individual library level to Resource Sharing staff and libraries that lack the resources and staff expertise to gather and assess usage data for themselves.
Objectives
Decrease TexShare Database Program membership attrition by increasing awareness of how patrons are using the electronic resources.
Greater awareness of the importance of data visualization for justifying programs and expenditures.
Increased adoption of COUNTER5 usage reporting standards.
Support Resource Sharing Team efforts to assess e-resource popularity and make informed decisions about resource maintenance and promotion.
Reduce staff time spent on manual data cleanup of usage data.

Deliverables

A workflow that fully or partially automates the cleanup and processing of TexShare usage data.

A database that stores the TexShare usage data.

A visualization dashboard that displays TexShare usage data.

Documentation and procedures describing the functions and use of all project deliverables.

Scope

The project will be limited to usage data from the current state fiscal year (FY2020). Usage data that is compliant with the COUNTER5 reporting standard will be prioritized. Limited non-compliant usage data will be included only as time allows.

A live usage dashboard that can be shared externally is a desired result, but not required for the initial project.

Project Milestones

The full Project Timeline runs from June 8 – July 31, 2020. See Project Timeline (attached) for details.

Project Planning Phase: June 8 – 15

Phase 1: Data Processing (Early June through Mid-July)
      1A – Data Preparation: June 8 – 19
      1B – Database Creation: June 22 – July 10
      1C – Data Workflows: June 22 – July 17

Phase 2: Data Visualization (Mid-June through July End)
      2A – Needs Assessment: June 15 – July 10
      2B – Usage Dashboard: June 22 – July 31

5. Known Risks, Constraints, and Dependencies

Risks	Risk Rating (High, Medium, Low)
Difficulty in obtaining access and support related to needed or desired technology or applications.	High (Internal)
Inconsistencies in data between vendors: non-compliance with COUNTER5 standards, different interpretations or applications of standards, other data irregularities.	Medium (External)
Potential for overreach in intended scope and/or desired functionality for initial project design.	Medium (Internal)

Insufficient time due to project manager's other assigned projects or work tasks.	Medium (Internal)
Limited access to data and information around data resulting from communication barriers and/or information silos.	Low (Internal and External)
Difficulty in creating a process that is replicable by staff lacking programming experience.	Low (Internal)

Constraints

Hard Constraints

Because the project is being undertaken as a university capstone, it must be completed no later than the class deadline of July 31, 2020.

Soft Constraints

Due to high workloads, the project manager will have limited support from TexShare Program and agency IT staff.

Project manager must continue to maintain other work responsibilities for the duration of the project.

Software available for project use is limited to those already licensed and approved by agency IT staff. Limited use of outside applications for the creation and running of data workflow processes is permitted temporarily pending future IT review but cannot be relied upon for the ongoing maintenance of the final product.

Project may not directly impact the processes or tools used by other staff in the management of usage data without staff input and permission.

External Dependencies

Project Sponsor

The project sponsor is needed to review and approve project milestones, assist with issues or barriers that may arise, and coordinate communication with agency IT staff and vendor technical contacts.

Resource Sharing Team

The Resource Sharing Team is needed to provide information and give feedback on staff needs related to usage data.

IT Staff

Agency IT Staff are needed to provide access and support related to software applications and permissions required for the completion of the project.

Library Stakeholders

Feedback is needed from targeted TexShare Database member libraries in order to determine library needs around usage data and how best these needs might be met.

TexShare Vendors

Continued monthly delivery of TexShare Databases usage data is necessary for the continued functioning of the project.

6. Communication Strategy *(specify how the project manager will communicate to the Executive Sponsor, Project Team members and Stakeholders, e.g., frequency of status reports, frequency of Project Team meetings, etc.*

The project manager will:

- meet with the project sponsor every Monday via teleconference to discuss project progress.

- contact project sponsor about urgent issues via email or ad hoc teleconference meetings.

- give a weekly progress report to the Resource Sharing Team during the team's regular Thursday meeting.

- communicate with stakeholder libraries via survey and email.

Communication facilitated by project sponsor includes:

- communication with agency IT staff.

- communication with e-resource vendors.

7. Sign-off			
	Name	**Signature**	**Date**
Division Director	Jennifer Peters	*Jennifer Peters*	6/23/20
Project Sponsor	Danielle Cunniff Plumer	*Danielle Cunniff Plumer*	6/17/2020
Project Manager	Kate Reagor	*KRg*	6/15/2020

PROJECT TIMELINE: USAGE REPORTING TOOL

Legend: Complete | To Do | In Progress | Upcoming | Deliverable | Aspirational | Blocked/Pending | Past Due | Dependencies

Category	Task	June 8-12 (Week 1)	June 15-19 (Week 2)	June 22-26 (Week 3)	June 29-July 3 (Week 4)	July 6-10 (Week 5)	July 13-17 (Week 6)	July 20-24 (Week 7)	July 27-31 (Week 8)	Project End Date
PROJECT PLANNING										
Admin & Research	Finalize software for database, data processing and visualization	finalize plans								
	Create Project Management Charter and Timeline		charter & timeline							
	Research usage standards and reporting tools/methods		Other consortia		C4-C5 crosswalk					
Documentation	Create documentation and procedures (ongoing)	Initial Priority List	Pcd: ID crosswalk		Workflow doc/how to update				Presentation	
	Documentation cont'd			Pcd: update lib info		Final DB Schema			Project Docs	
PHASE 1: DATA PROCESSING										
Data Prep	Review usage reports and create initial priority assessment	priority assesment								
	Investigate ProQuest Platform reports to determine viability for inclusion		Discuss w ProQuest (DCP)							
	Develop preliminary database schema and insertion workflow draft		DB Workflow Plan							
	Update vendor ID crosswalk and convert into table structure		ID Crosswalk							
Database	Create database structure in Access and populate with library info and vendor ID data			Make DB and insert data						
	Import all vendor usage data into database					Database				
Workflow	Conduct detailed data transformation assessment of all datasources		Data Assessment							
	Have first data cleanup & insert workflow written and functional			1st workflow						
	Data cleanup & insert workflows complete for all C5 compliant reports				C5 Workflows					
	Data cleanup & insert workflows complete for non-compliant reports				Non C5 Workflows					
	Test and run update workflow using July 2020 data						July data update			
PHASE 2: DATA VISUALIZATION										
Needs Assessment	Determine target library types for stakeholder survey on usage needs and priorities		lib types							
	Create and send survey to targeted library stakeholders		Create Survey							
	Analyze survey results, create report on findings			analyze results						
	Follow up with focus group volunteers, set meeting date and agenda				agenda					
	Meet with group, create report on findings				hold focus group					
Dashboard	Use sample data to create initial dashboard prototype			dashboard draft						
	Gather and incorporate feedback from staff, library stakeholders				gather feedback, refine dashboard			feedback, refine		
	Have a working prototype of the vizualization dashboard, connected to database						prototype dash			
	Dashboard finalized and able to be shared in some form								Dashboard	