



An Experiment in Investment Decision-Making

Agile Portfolio Management in a Research Library

Nicholas Taylor

National Laboratories Library Consortium Meeting

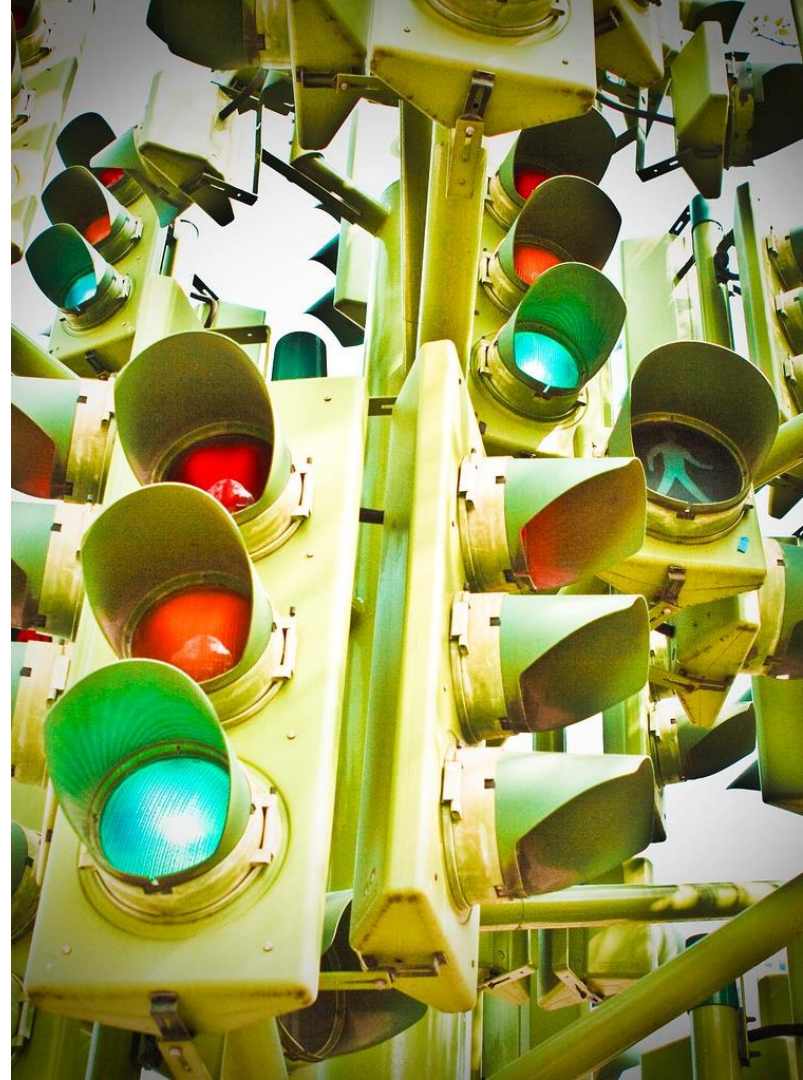
25 April 2023

LA-UR-23-24065

Strategic landscape

- We serve a knowledge organization
- Competitive environment for information services delivery
- Institutional presumption of our value is not assured
- Grow non-commodity offerings

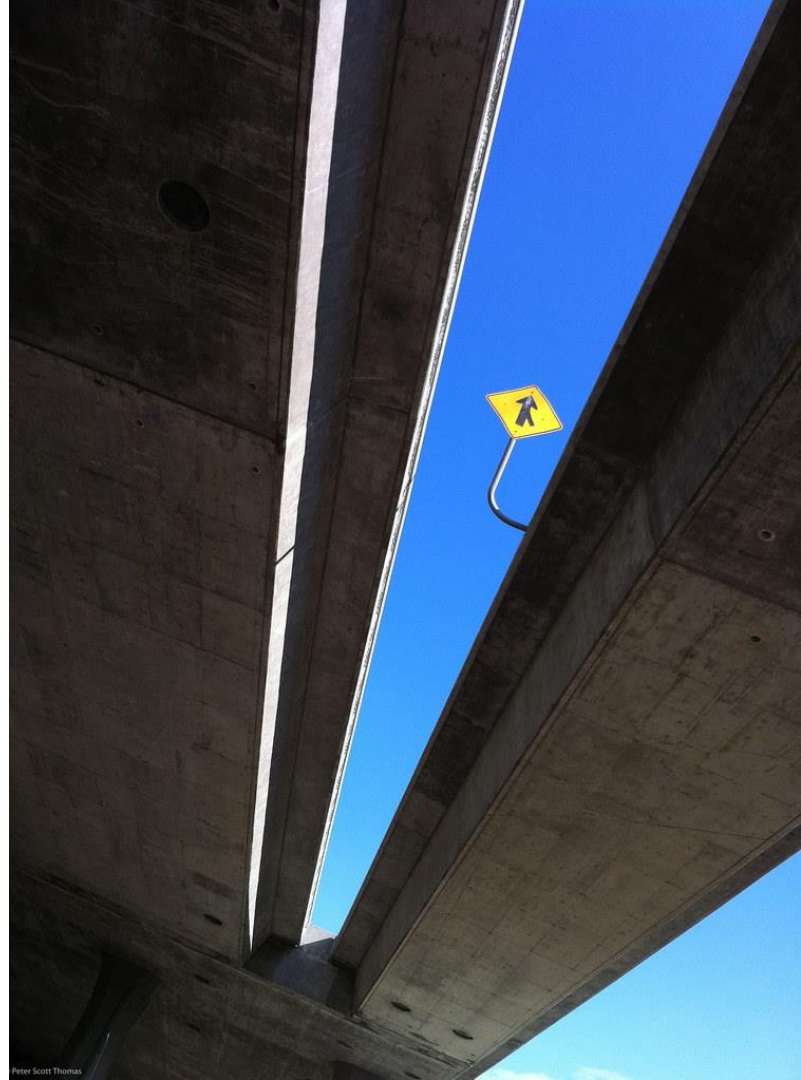
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What does that call for?

- To understand our customers' evolving needs
- To provide responsive services aligned with organizational goals
- To understand the evolving information and scholarly ecosystems
- To innovate, and sustain that innovation, across all of our portfolio

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Strategic plan(ning)

- Five-year strategic planning in 2021
- Facilitated, with full group participation
- Key elements: goal → strategy → action hierarchy, mission, vision, values
- Revised goals + values in 2023
- Intend ongoing full group quarterly review

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Mission

*We amplify the Laboratory's mission-driven research by **enabling** LANL researchers to learn powerful skills and access expertise and scholarly information, **developing** new methods for managing data and information, and **connecting** researchers with colleagues and the broader scientific ecosystem.*

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Vision

*We are shaping the future of research libraries: **digital-first** institutions with a **seamless user experience** and services that evolve with the **open and classified information** ecosystem, and where **collaboration and open scientific research** are integral.*

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Goals (or, well, priorities)

1. Develop and enhance strategic partnerships
2. Steward Laboratory STI
3. Enable access for humans and machines to relevant research content
4. Cultivate and foster an inclusive environment
5. Advance open science

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The Agile turn

- Strategic plan(ning) necessary but not sufficient
- Need the foundation of mission, vision, values
- Need to be able to discover what's most important
- Need to be a learning and “leaderful” organization

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Agile mindset + practice

- Core tenets: experimentation, adaptation, customer-centricity, iterative development
- Depends on self-organizing teams, peer accountability, role-based authority
- May be operationalized in practice via Scrum, Kanban, other frameworks
- A simple idea, at its core: try something → learn (repeat)

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Agile transformation

- Engage external coach, assemble Agile Transformation Team, assess Agile maturity
- Group-wide Scrum training + leadership development curriculum, topical workshops
- Scrum Master-supported practice of Agile frameworks for projects
- Portfolio management framework

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Agile portfolio management

- *Portfolio* is conceptual scope of services
- *Portfolio management* is a framework for surfacing, evaluating, electing investments
- Foster participatory + transparent decision-making, distributed leadership, collective accountability
- Structured process to cultivate best ideas

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Epics

- Fundamental unit of the portfolio management framework
- Investment idea conceived of as an experiment
- Specified in an *epic hypothesis statement* to start; elaborated in *lean business case*
- Includes related strategic goals, leading indicators, elevator pitch

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Epic owners

- Key actor in the portfolio management framework
- Potentially anyone, with an investment idea they want to develop + champion
- Develop epics through consultation with users, colleagues, implementation team, stakeholders, Portfolio Advisory Team
- Work with implementation team to realize MVP

["BLM Idaho Partners with Shoshone-Paiute Tribe to Grow Native Plants for Sage-Steppe Restoration"](#)
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Portfolio Sync + related roles

- *Portfolio sync* is monthly meeting to take up new + advance existing epics
- Meant to be action-oriented + strategic rather than info sharing
- Supported by a *Facilitator*
- Epics evaluated by *Advisory Team*

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Signs of progress

- Epics proposed by line staff
- Epics having progress all the way through implementation
- Improved socialization + engagement for single team-originated projects
- Mechanism to quantize investment in + progress on strategic priorities

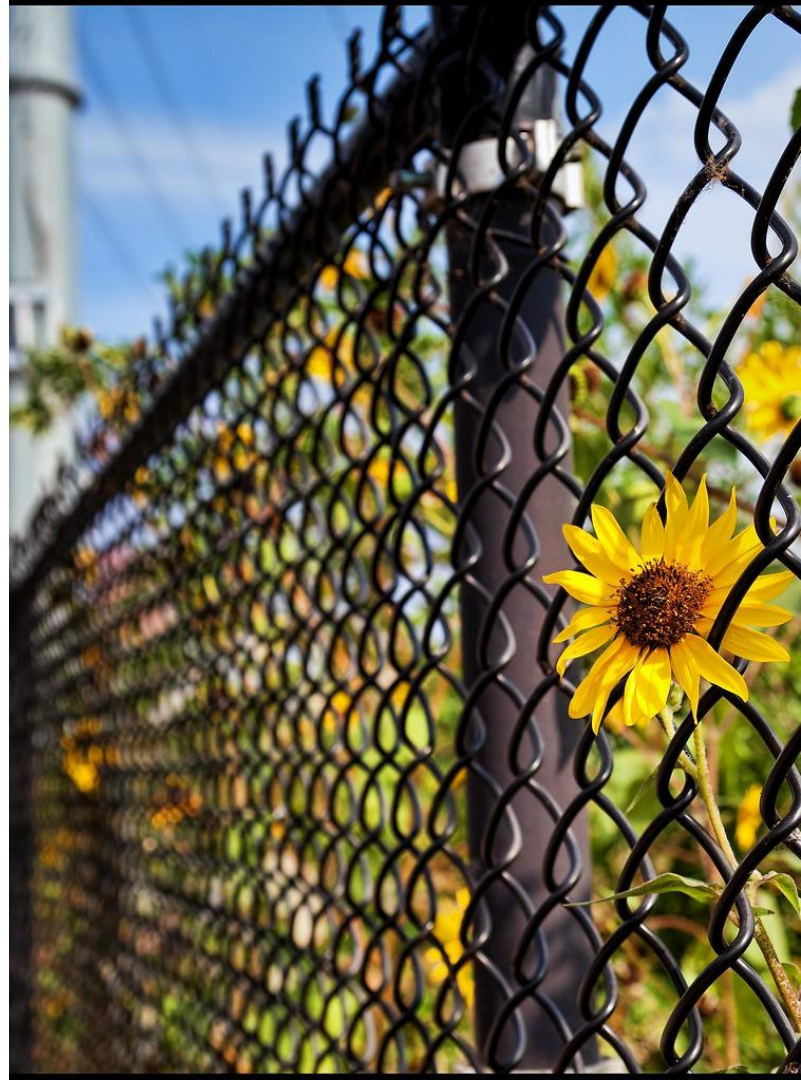
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Outstanding challenges

- Balancing Agile self-organization with Scrum or portfolio management practice
- Overcoming reflexive aversion and adapting frameworks to library work
- Knowing enough to try something else
- Change management fatigue
- Ensuring representation of entire portfolio

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New experiments

- Lean(er) portfolio management
- Shrink Advisory Team to a more action-oriented + accountable size (9 → 6)
- Rotate, charge, onboard new Advisory Team members
- Simplify supporting artifacts + processes
- Instrument + retrospect

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Thank you!