



Project management strategies for accommodating Go Local development within a full workload

Patricia Lee*, MLS; Nila Sathe*, MA, MLIS; Rachel Walden*, MLIS; Marcia Epelbaum*, MA; Annette Williams*, MLS; Nunzia B. Giuse*†, MD, MLS, AHIP

*Eskind Biomedical Library / †Departments of Biomedical Informatics and Medicine, Vanderbilt University Medical Center, Nashville, TN
(Project supported by a grant from the National Library of Medicine)

Objective: To develop workflow models to optimize data collection; capitalize on knowledge gains; and promote efficiency in Go Local directory development

Rationale/Methods

- In developing a Go Local proposal, the team factored in an extended project period to allow a **6-month partnership development and workflow experimentation phase**
- The team reviewed ongoing work/projects to determine staff percentages, eventually forming a **core team** who would dedicate more time to the project, and a **staff-wide selector group** who would contribute an initial push of records
- Core team began to collect records to **determine optimal process flow**; experimentation with searching techniques, locating useful directory resources, etc.
- Core team developed **knowledge management processes** to capture and share knowledge gained from initial exploration and ongoing work: project notebook, shared templates, periodic group sharing meetings
- Team developed an **initial workflow to optimize collection yield; minimize time spent; and promote a level of standardization/systematization** among selectors
- Leadership endorsed periodic record collection “drives”** to focus staff effort on site population

Core Workflow Strategies

- Phased project by priority of topics (e.g. TN priorities, NLM-established priorities 1-3)
- Divided state into **counties/regions of responsibility** for each staff member
- Developed phase I **searching workflow**: TN-specific directories; Google Maps by category; targeted general Web searching
- Elected to use **batch import system** given number of selectors; periodic test uploads to promote standardization and minimize duplication of effort
- Bi-weekly statistics reporting to **track effort**

Knowledge Management and Workflow Techniques

	A	B	C	D	E	F	G	H	I	J	K	M
	Site Name	Site URL	Address 1	Address 2	City 100	State 2	Zip code 5	Zip code 5	Phone Extensio	E-mail	Site Description 500	Comments 4000
1	244 Char	1100	200 1st Line	ess 2								
2	Special Kids	www.specialkidsdn.com	202 Arnette St		Murfreesboro	TN	37130		615-890-1003		Provides nursing and rehabilitation services including occupational, physical, and speech therapy and skilled nursing for special needs	
4	HUG (Help Grow) at the Rutherford County Health Department				Murfreesboro	TN	37130		(615) 898-7785		Provides in-home nurse visits to families with children at risk for developmental delays	
	Nurse on Duty at the St Clair Street Senior		325 St Clair St		Murfreesboro	TN	37130		(615) 848-2551		Provides basic health assessments such as blood	record suitable for Health Screening also

Standardized collection templates housed on shared drive—Comments field used for notes to reviewers to indicate multiple category applicability and minimize duplication.

EBL Go Local Tennessee Project Manual:
Workflow for Phase I

- Create four templates for your assigned county by making a copy of master template files at R:\Go Local\Templates. For each county you should have 4 separate Excel files: TN priorities, NLM Priority Level 1, NLM Priority Level 2 and NLM Priority Level 3; include a template. Beginning with the list of **TN priorities priority topic**

Tennessee General Directories and Tools

- http://health.state.tn.us/HCF/Facilities_Listings/facilities.htm
- <http://www.tennesseeanytime.org/local/counties.html>
- <http://www.211tn.org/>
- <http://www.tdot.state.tn.us/Maps/county/>
- <http://tn.allpages.com/>
- <http://kc.vanderbilt.edu/tnpathfinder/searchdb/> (added 8/15/07)
- <http://www.tennhelp.com/Home/PublicWeb/TennHelp> (added 8/16/2007)
- Blue Cross Mini Directory <http://www.franklin-gov.com/pdf/BCBST%20Physician%20Listing.pdf> (added 10/05/07)
- <http://healthprofs.com/cam/cities/TN-Tennessee-practitioners.html> (added 10/04/07)
- http://www.healthcarehiring.com/group_homes_tennessee.php (added 9/06/07)

Project manual on shared drive—contains links to useful directories/resources. Continually updated as staff add resources as relevant and notify team.

	C	D	E	F	G	H
7/27/2007	840	807	824	907		
				0	0	60
				0	67	319
2	178	0	0	297	563	
0	69	245	305	346	403	
11	24	36	59	116		
15	111	163	247	395	714	
130	75	335	442	505	696	
152	248	416	601	767	815	

Bi-weekly statistics tracking for all project team members. Collection templates contain formulas to tabulate totals dynamically.

Next Steps

- Continue to seek **partnerships/collaboration**
- Continue to **populate Go Local Tennessee site** and **refine development processes** to facilitate maintenance
- Review, refine, and categorize records** collected
- Launch site—**anticipated launch timeframe: Summer/Fall 2008**