Where to begin: Basics of project planning for GLAM organizations

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Outline

Introduction

1. Project Planning Discussion & Lecture

2. Project Management Discussion & Lecture

3. Tools Lecture

Questions, Answers, Feedback

1.Project Planning

What do you think are the key elements that define a project?

1.Project Planning

What do you think are the key elements that define a project?

The group spent 5 minutes discussing this question. A complete transcript of Chat 1, Key Elements of a Project, can be downloaded on the webinar's home page found in the text below.

Project Planning & Project Management:

Don't make an

elephant out of a fly!

Balancing day-to-day operations & a project

- A project requires time: you can't do what you always do + the project.

- Spot tasks you can stop doing while working on the project.

- Mind your mission: You can't stop providing all your services!

- Explore the options: Some services might take longer, or you could assign tasks to other colleagues and volunteers.

It might take up to 6 weeks to work our research magic for you.

Your Library Wizards

Choosing a collection

- Value for research
- Interests more than one field of researchers
- Suffering under current storage conditions
- Acute risk of information being lost
- Easy/hard to process
- Additional thoughts

Made possible through the generous support of The Andrew W. Mellon Foundation.
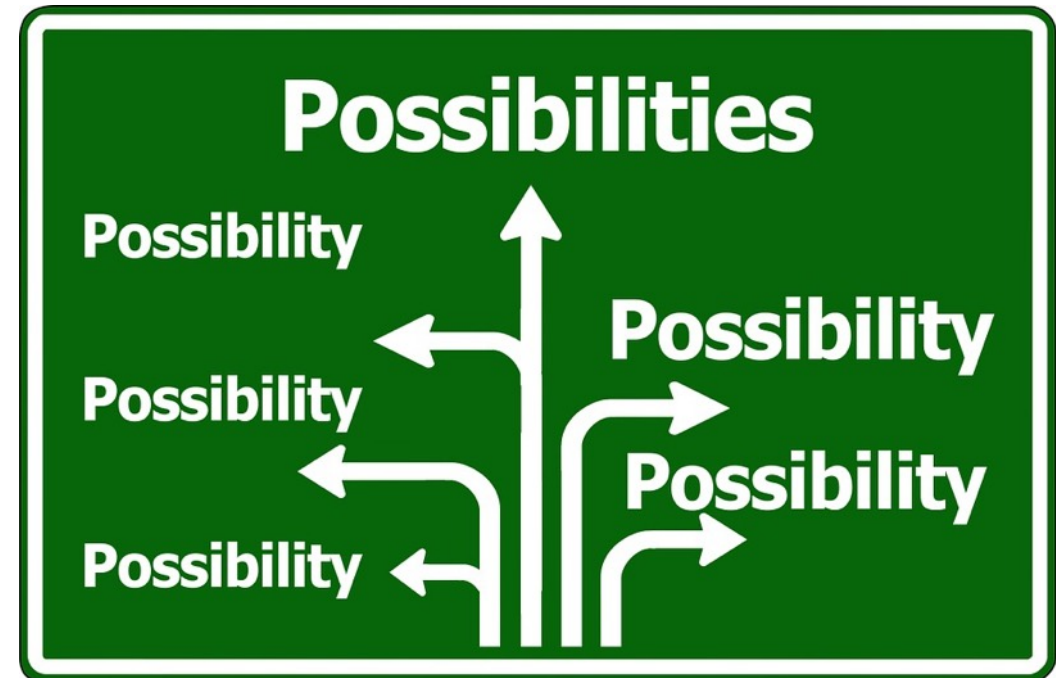
Decision Matrix

	Hyde's Collection	Waterworks Documents	Toys from Burkhard's Collection
Value for Research	✶✶	✶✶✶	✶
Interesting for more than one field?	✶✶✶	✶	✶✶
Suffering under current conditions?	✶	✶	✶✶✶
Danger of deteriorating beyond repair?	✶	✶	✶
Easy to process?	✶	✶✶✶	✶
What are your thoughts on this collection?	I guess there are some interesting stories in there.	Pretty boring stuff, to be honest.	Would make a nice exhibit for Christmas in the reading room.

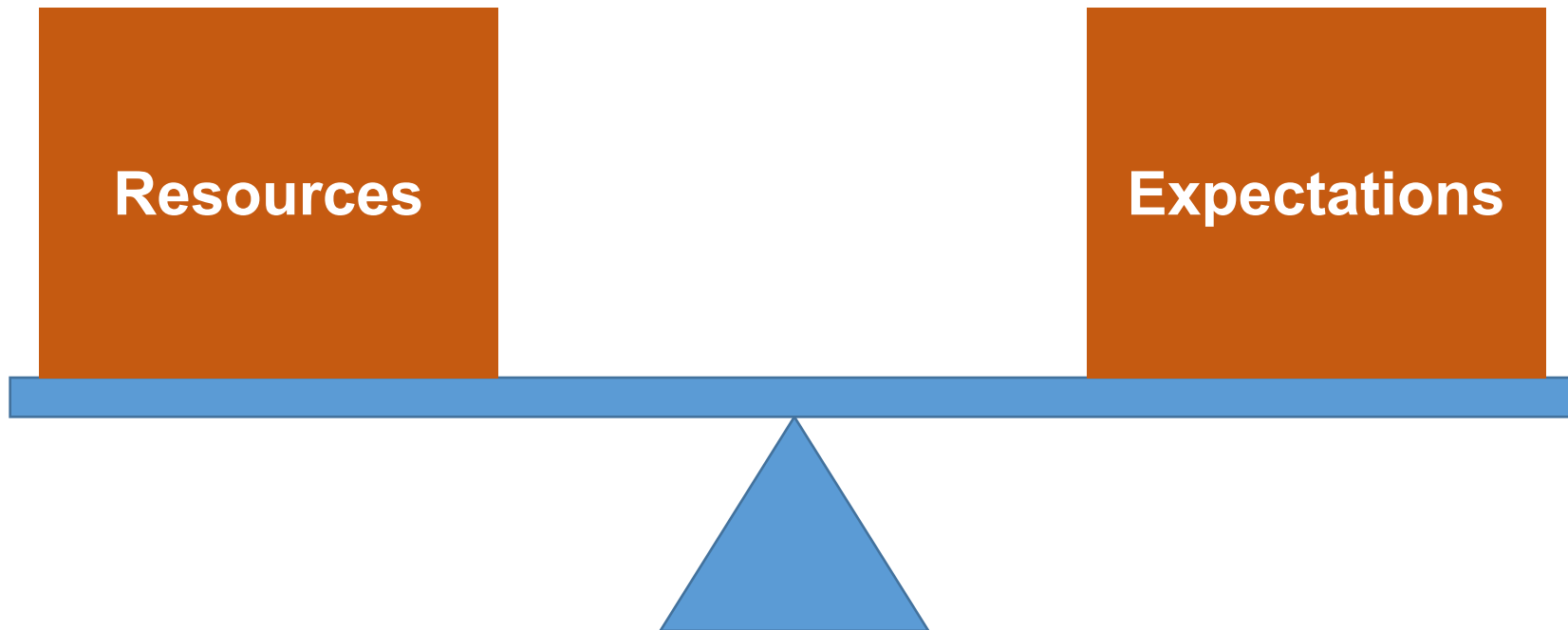# The Project Goal

Deciding what to do –

& what not to do

Possible goals for a cataloging project

- Fully processed collection

- A set of finding aids or indices

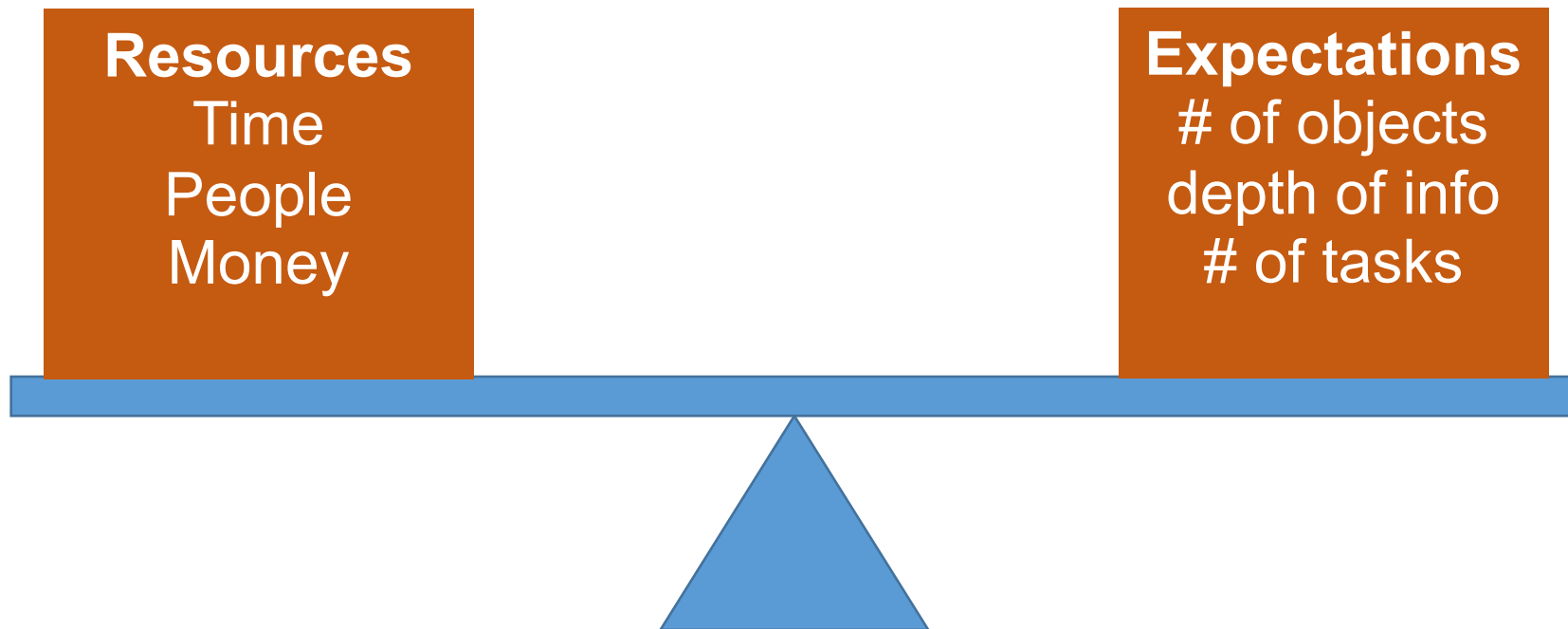- Minimal level database or spreadsheet

Good project planning is about keeping resources & expectations in balance
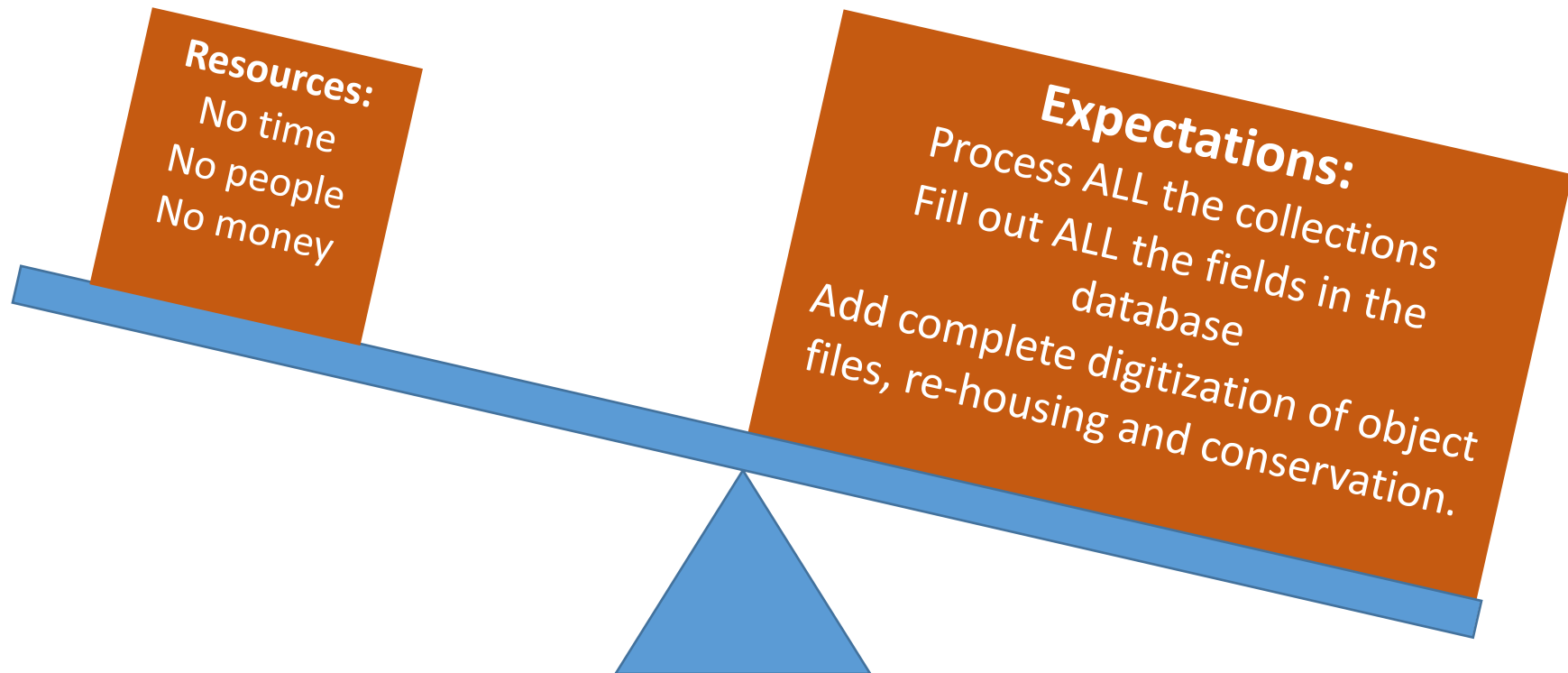
Resources

Expectations

Good project planning is about keeping resources & expectations in balance

Resources
Time
People
Money

Expectations
# of objects
depth of info
# of tasks

At the beginning of your planning phase your cataloging project might look like this:

Resources:
No time
No people
No money

Expectations:
Process ALL the collections
Fill out ALL the fields in the database
Add complete digitization of object files, re-housing and conservation.

You can reach balance by improving your resources…

Resources:
10 years

20 people

Some billion $

Expectations:
Process ALL the collections
Fill out ALL the fields in the database
Add complete digitization of object files, re-housing and conservation
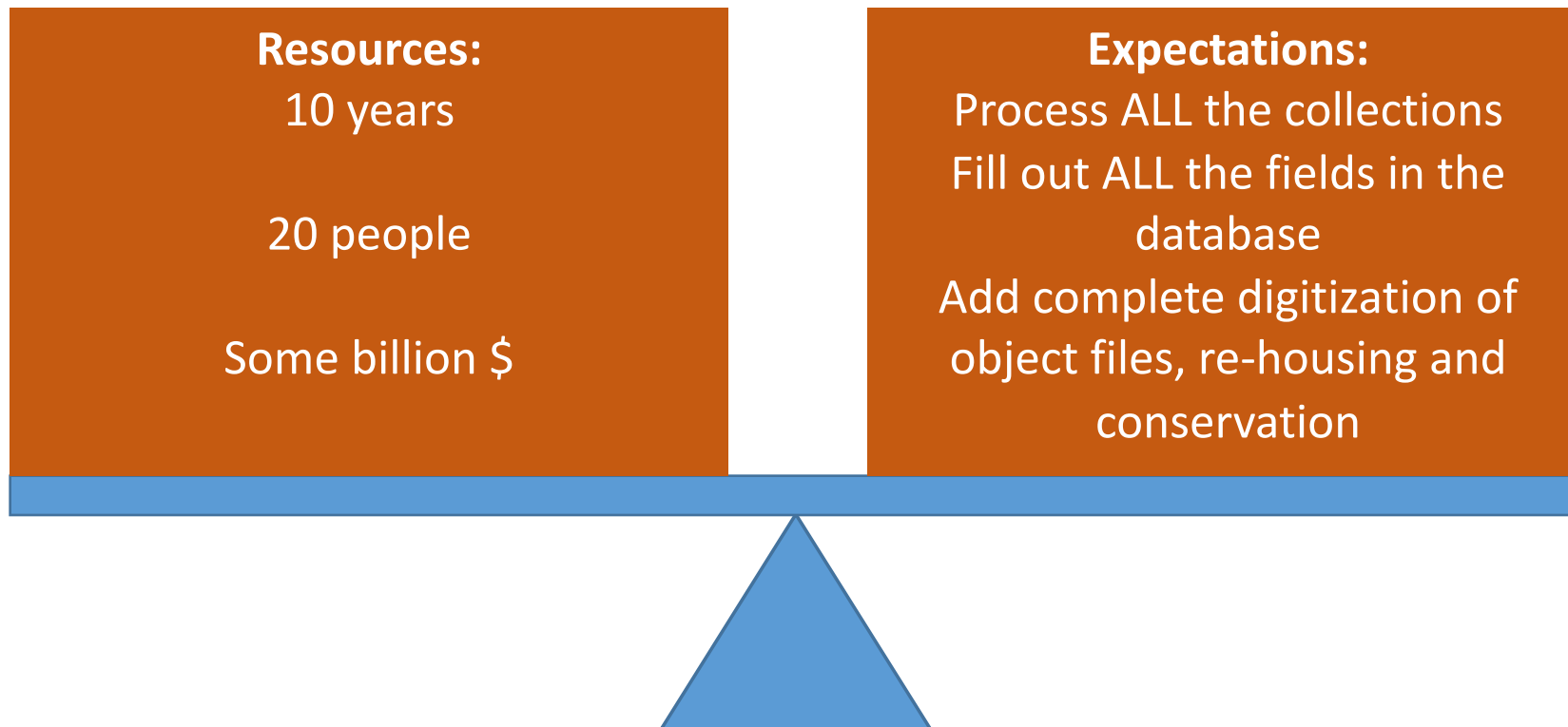
…or lowering your expectations.

Resources:
No time
No people
No money

Expectations:
Somebody
does some
cataloging,
sometimes.
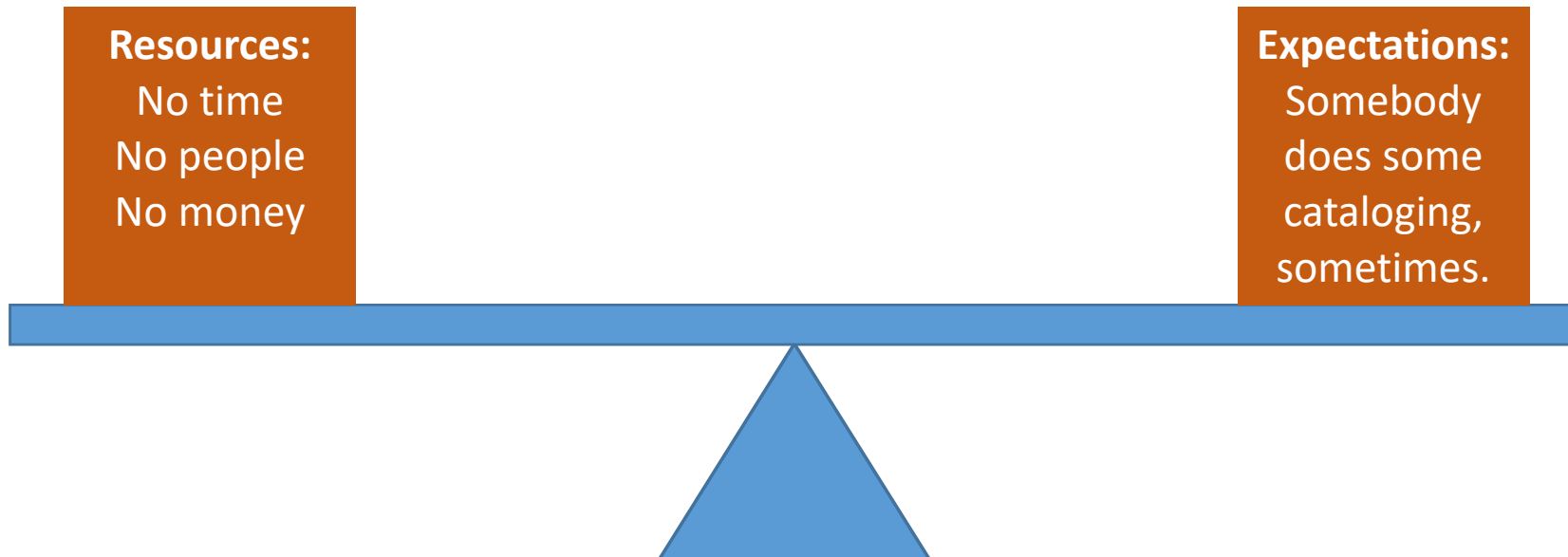
Most likely, you will both lower your expectations and build up your resources.

Resources:

2 years
2 people
20,000 $

Expectations:

1,000 objects
5 required fields in the database
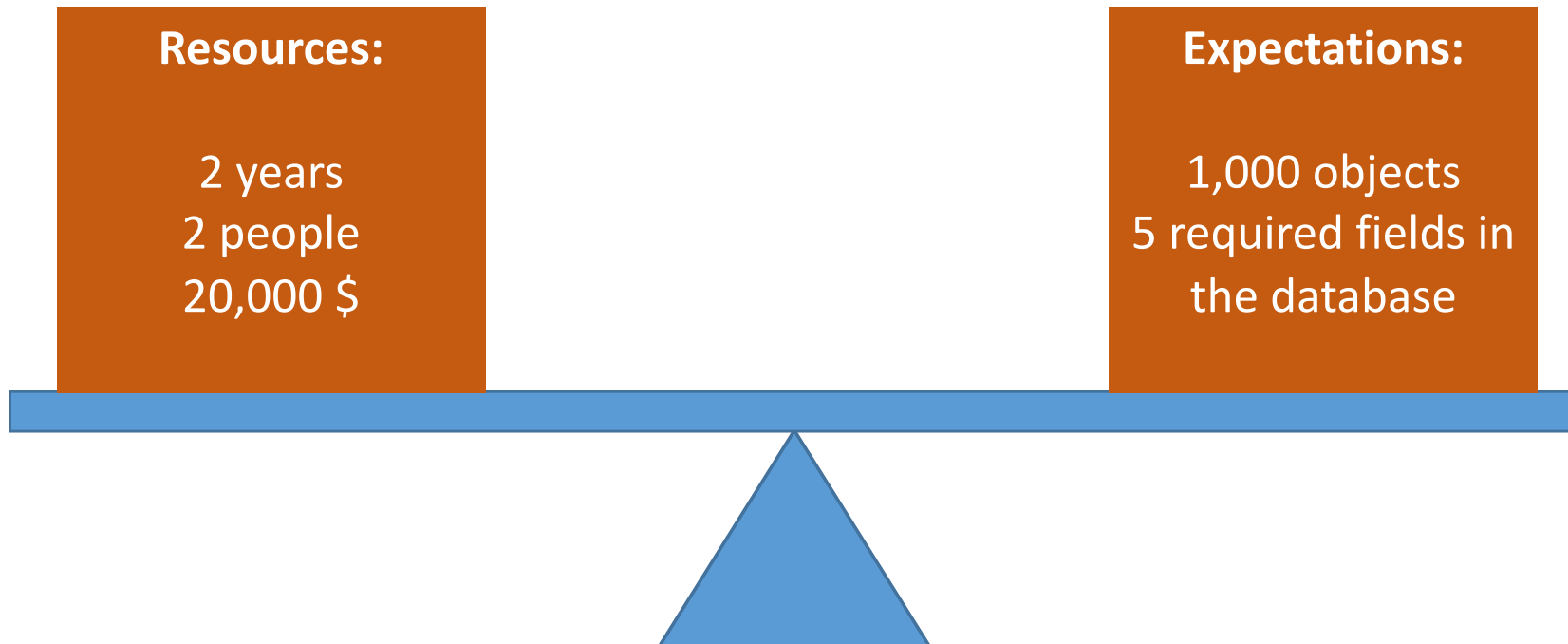
How long does it take to do a catalog entry?

How long does it take to do a catalog entry?

The group spent 5 minutes discussing this question. A complete transcript of Chat 2, Time to Catalog, can be downloaded on the webinar's home page found in the text below.

It depends

- Nature of your collection
- Number of required fields
- Depth of information

Easy & fast

It depends …

- Controlled vocabluary available
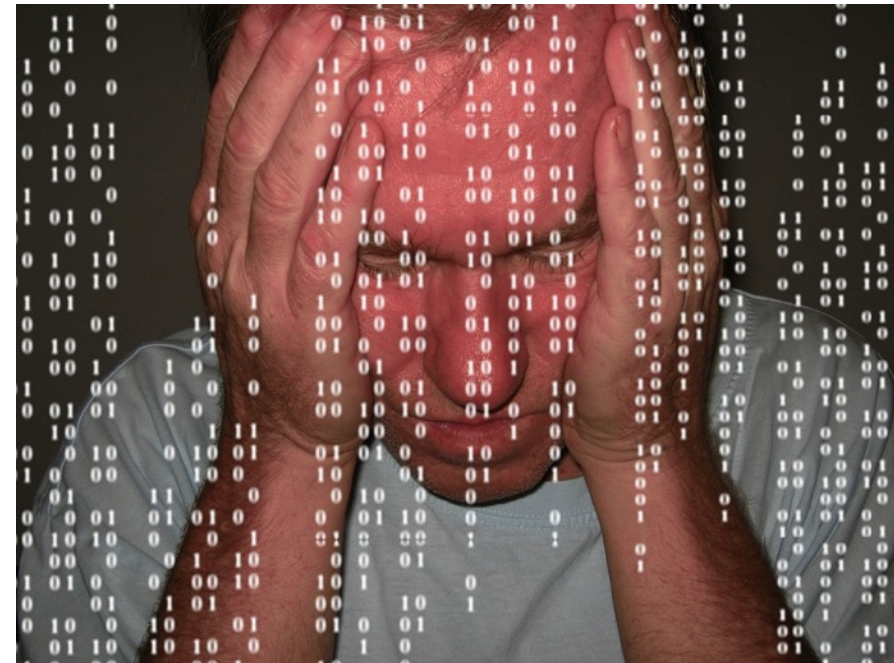- Workflow

Hard and slow
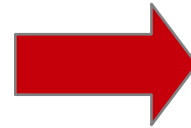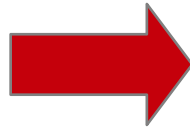
Do some testing – choose good samples

The problem with communicating numbers

The right steps in the right sequence

Steps towards your cataloging goal

1. Give the object a number
2. Do catalog entry
3. Take photo
4. Rehouse object
5. Store object

Repeat until collection is processed

Steps towards your cataloging goal

Legend
Red = Fixed sequence
Green = Order is interchangeable

- Give the object a number

- Do catalog entry

- Take photo

- Rehouse object

- Store object

How will you organize it?

- Make sure you have all necessary material & staff.

- Make sure you have limited some uncertainties.

Do you have everything you need?

- What materials will you need?

- What tools will you need?

- What is available in terms of staff?

- What has to be done before the project officially starts?

Deadlines

Date	Task
January 15	Deadline for project outline to be sent to board members.
February 28	Board meeting—decision if project is approved
March 12	Deadline for grant is March 15th; application must be sent on the 12th to make sure it arrives on time.
May 15	Grant nominees are announced.
June 1	Official start date of project
December 31	Official end date of project

What really happens

Legend
Black = Deadlines
Red = Fixed sequence tasks

Date	Task
Until January 12	Write project outline. Compile list of needed materials & tools.
January 15	Deadline for project outline to be sent to board members.
January 15- February 28	Testing phase to define cataloging numbers.
February 28	Board meeting—decision if project is approved
February 28- March 12	Write grant application. Talk with staff about project—do a presentation about the project & its goals for staff members. Buy tools & materials.
March 12	Deadline for grant is March 15th; application must be sent on the 12th to make sure it arrives on time.
March 12-May 15	Set up the working space. Do test runs & sample catalog entries. Train current staff. Learn to use new tools. Try to spot issues with current collection. Write job announcement & prep HR so they can start the hiring process as soon as your institution is awarded the grant.
May 15	Grant recipients are announced.

What really happens, continued

Legend
Black = Deadlines
Red = Fixed sequence tasks
Green = Exact date to be determined

Date	Task
June 1	Official start date of project
June 1-July 1	Starting phase—get comfortable with equipment; train new staff. Spot issues & streamline the workflow.
July 31	Evaluate catalog entries in both quantity & quality; make adjustments.
	Celebrate 500 catalog entries.
September 30	Evaluate catalog entries in both quantity & quality; make adjustments.
	Celebrate 1000 catalog entries.
November 30	Evaluate catalog entries in both quantity & quality; make adjustments.
December 31	Official end date of project

2.Project Management

What does a project manager have to do in a cataloging project?
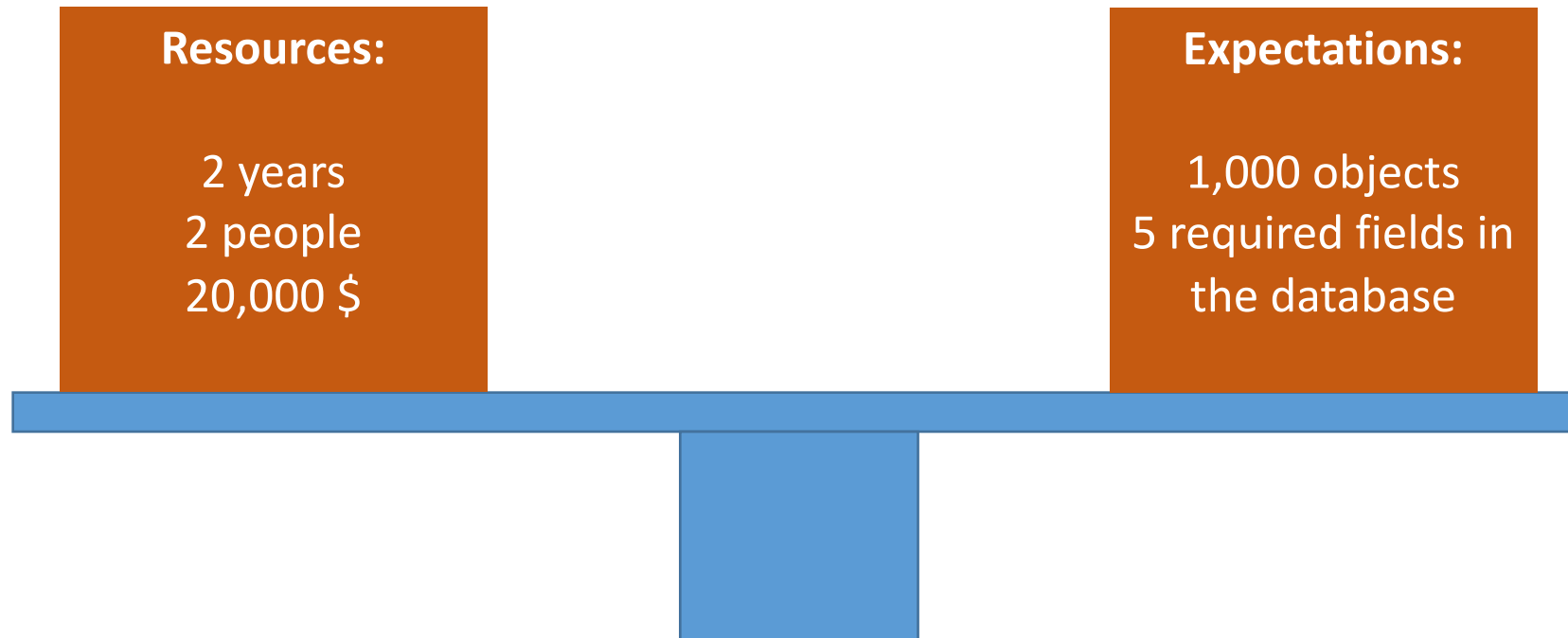
2.Project Management

What does a project manager have to do in a cataloging project?

The group spent 5 minutes discussing this question. A complete transcript of Chat 3, Project Management, can be downloaded on the webinar's home page found in the text below.
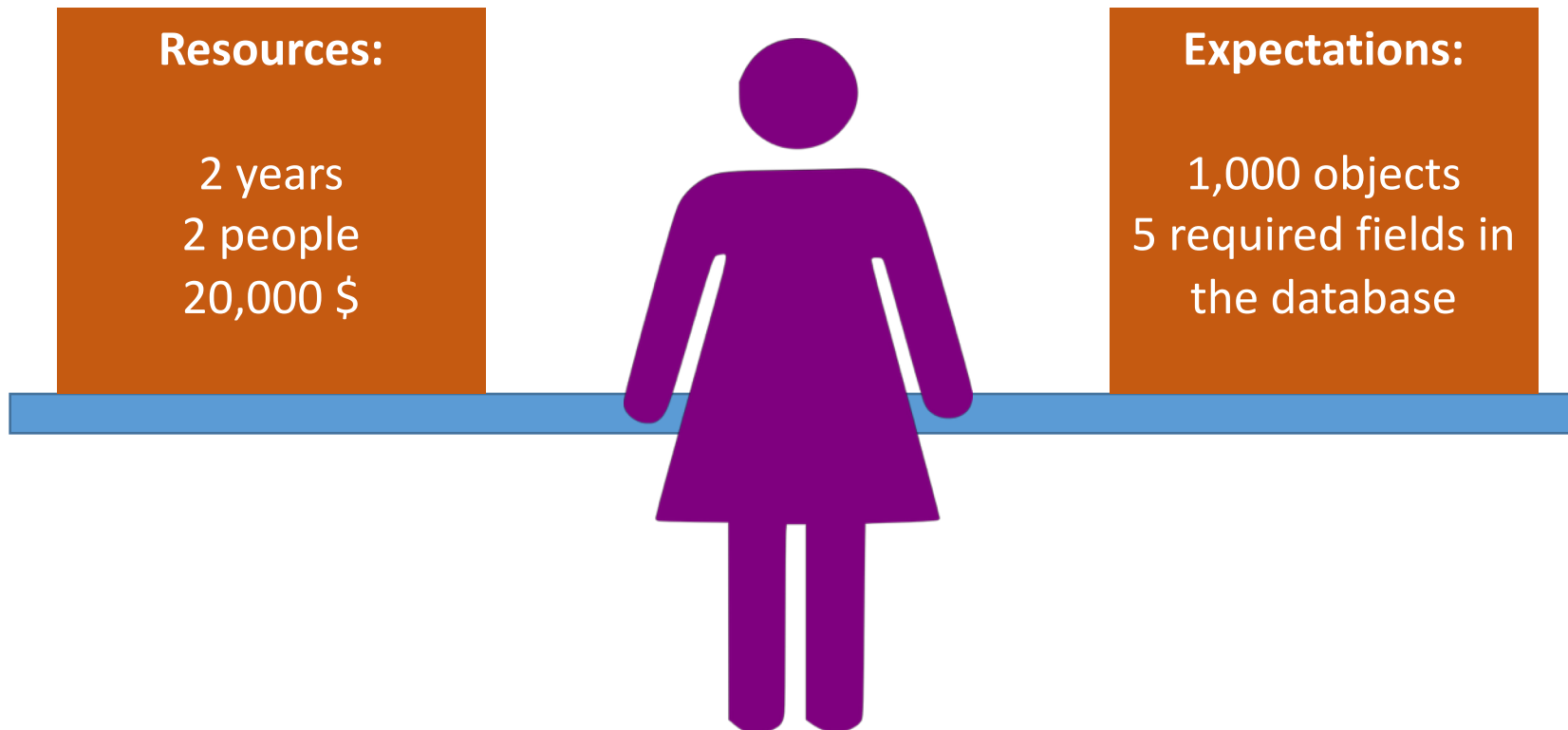
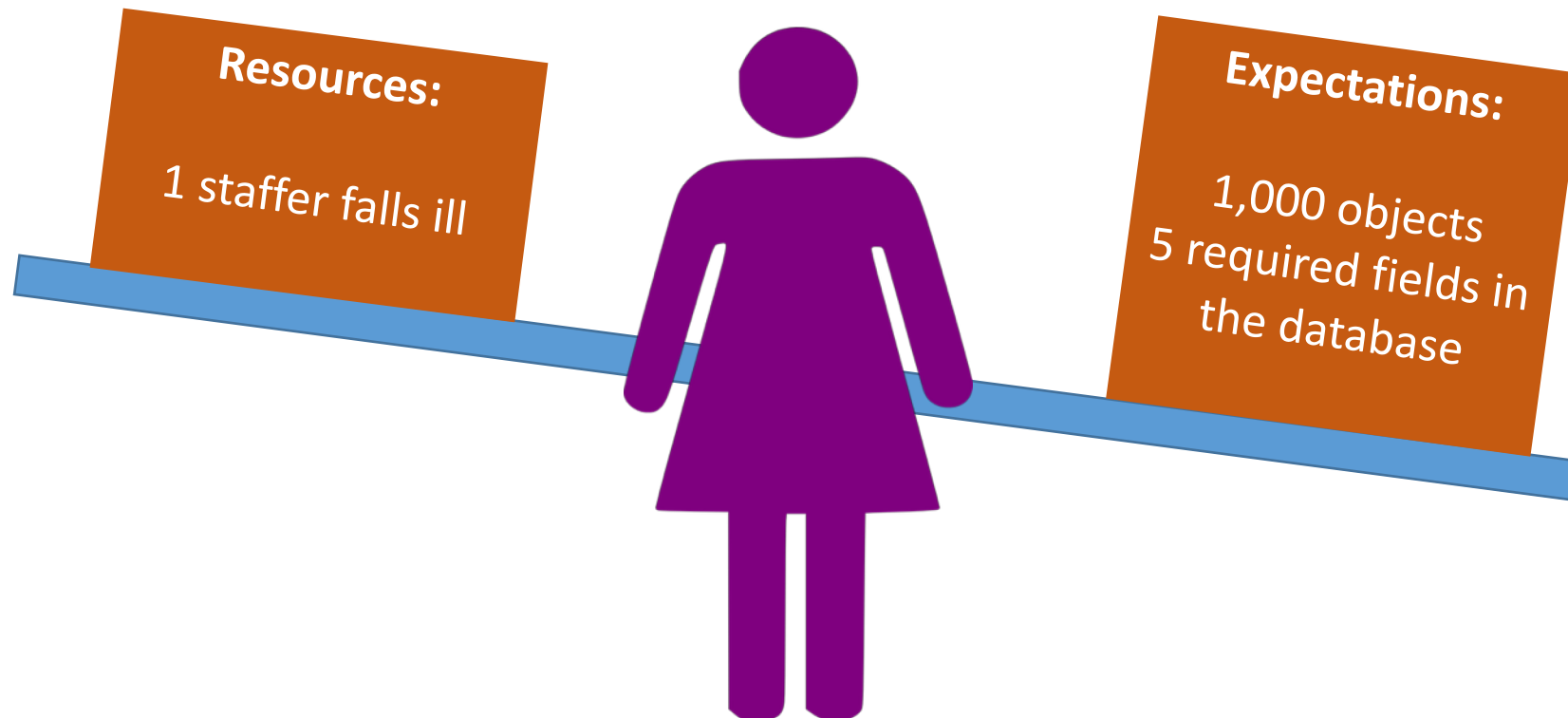# A common misconception: when project planning is done, it's done.

Resources:

2 years
2 people
20,000 $

Expectations:

1,000 objects
5 required fields in
the database

In reality it's an ongoing balancing act with the project manager doing the balancing.

Resources:

2 years
2 people
20,000 $

Expectations:

1,000 objects
5 required fields in the database

Reacting to unforeseen occurences…

Resources:

1 staffer falls ill

Expectations:

1,000 objects
5 required fields in
the database

…so that the project stays in balance.

Resources:

hire someone new

shift deadline

Expectations:

1,000 objects
5 required fields in
the database

…so that the project stays in balance.

Resources:

keep going with
only 1
staff member

Expectations:

reduce object
number &/or
limit required
fields
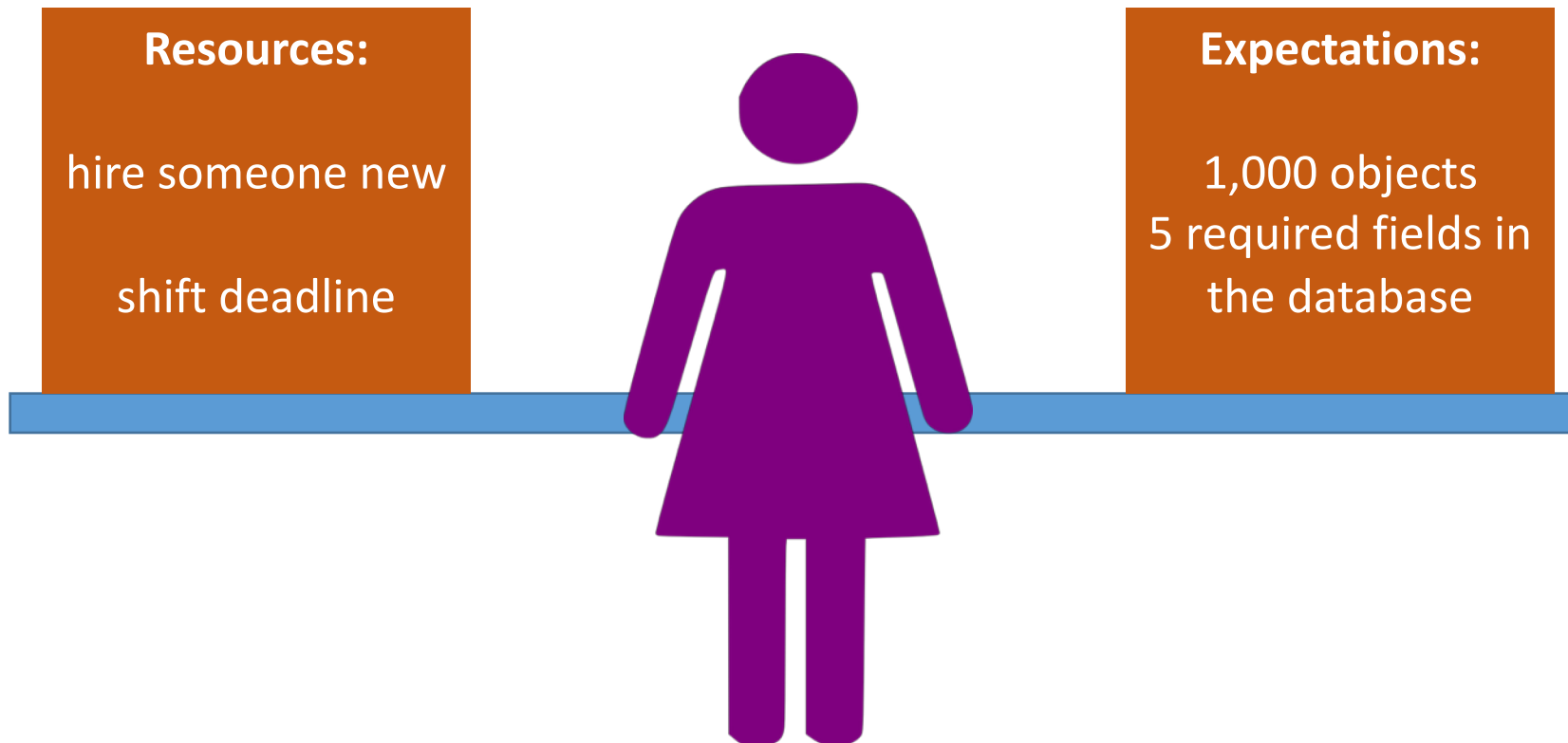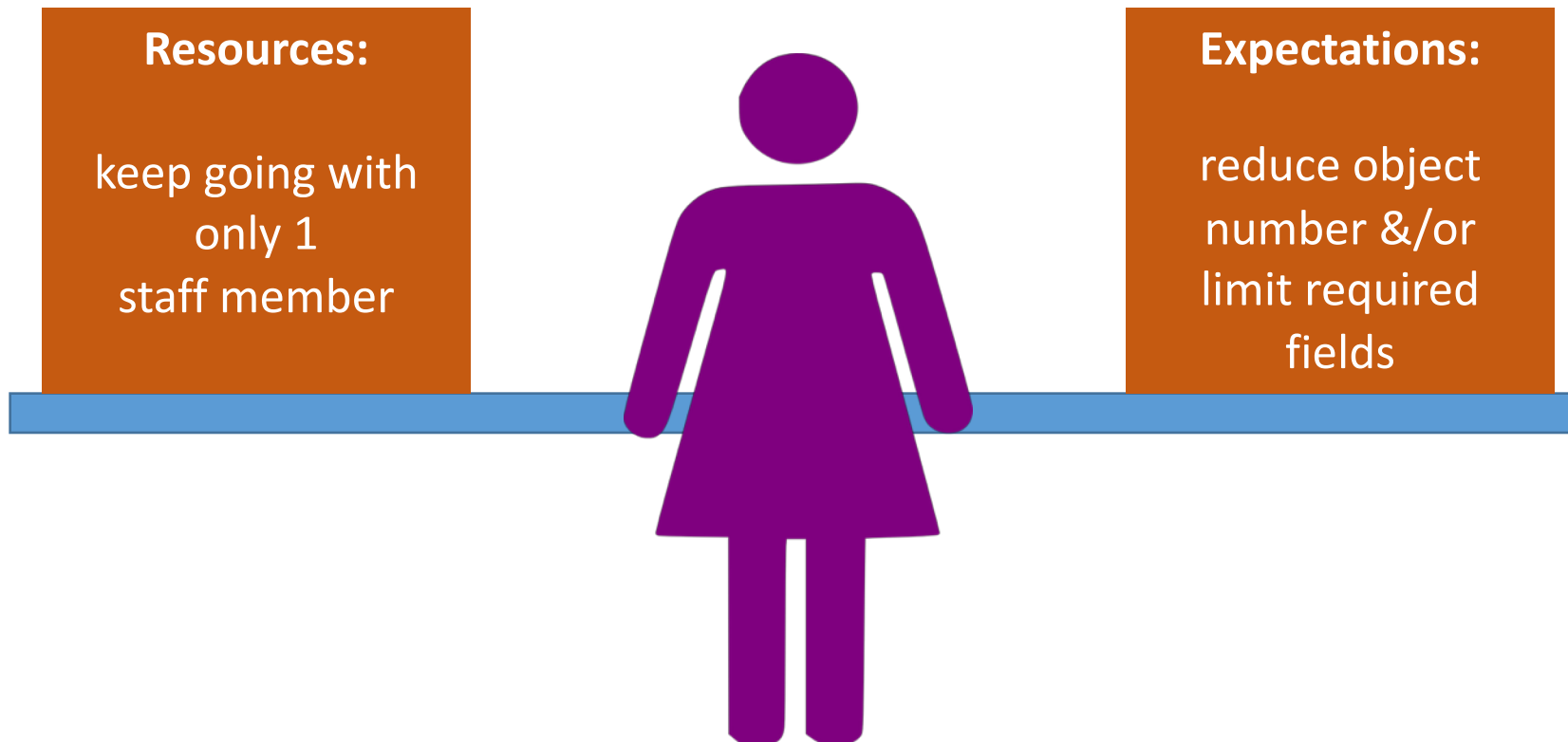
To make the balancing act more feasible, a good project plan always contains a certain buffer.

Resources:

2 years
2 people
20,000 $

Expectations:

1,000 objects
5 required fields in the database

Project goal
can be achieved in 20 months with 2 people working 90% and a budget of $18,000

11/5/18
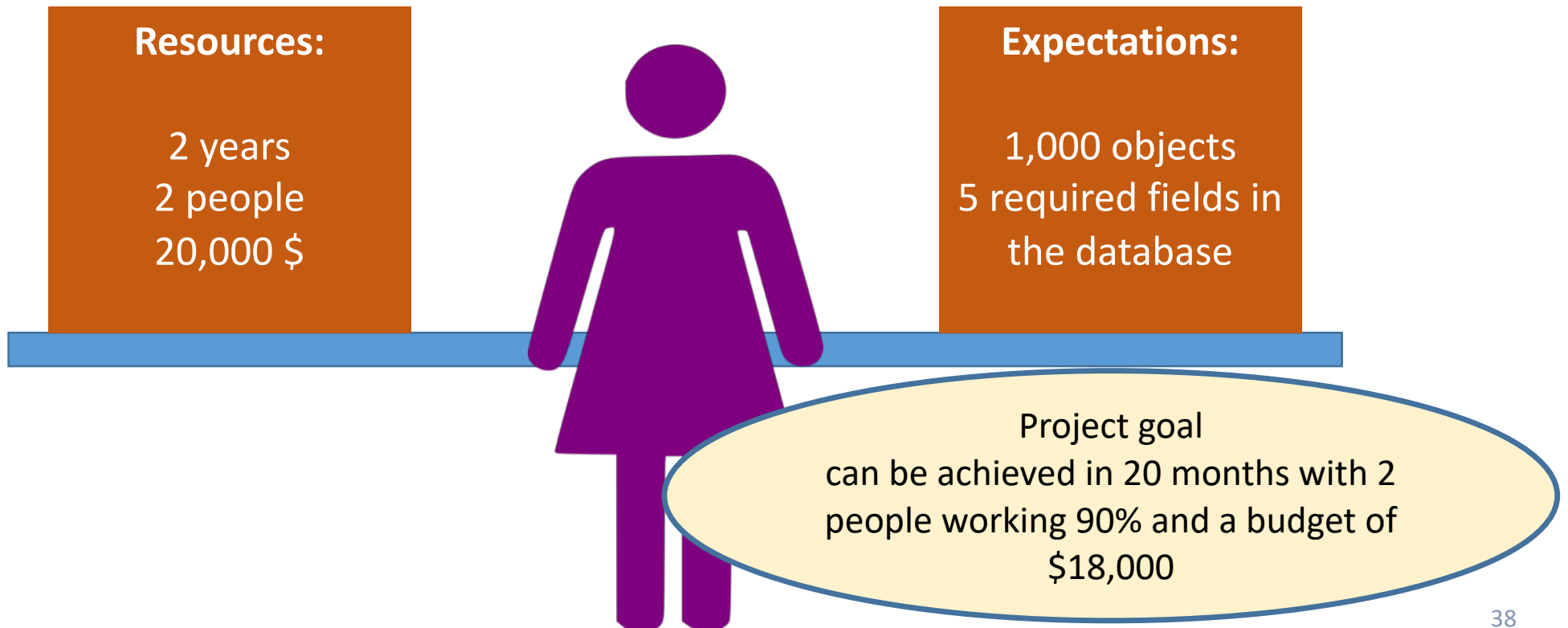
Team Size

Team size has pros & cons …

The One-Woman-Show

- Cataloger, database manager, photographer, art handler, human resource officer, administrative officer, secretary, press officer and janitor in one

- No chance to delegate tasks

- Most freedom/autonomy

The Team of Two

- Can be a dream or a nightmare
- Talk about roles, expectations and preferences
- Use the power of doing tasks together

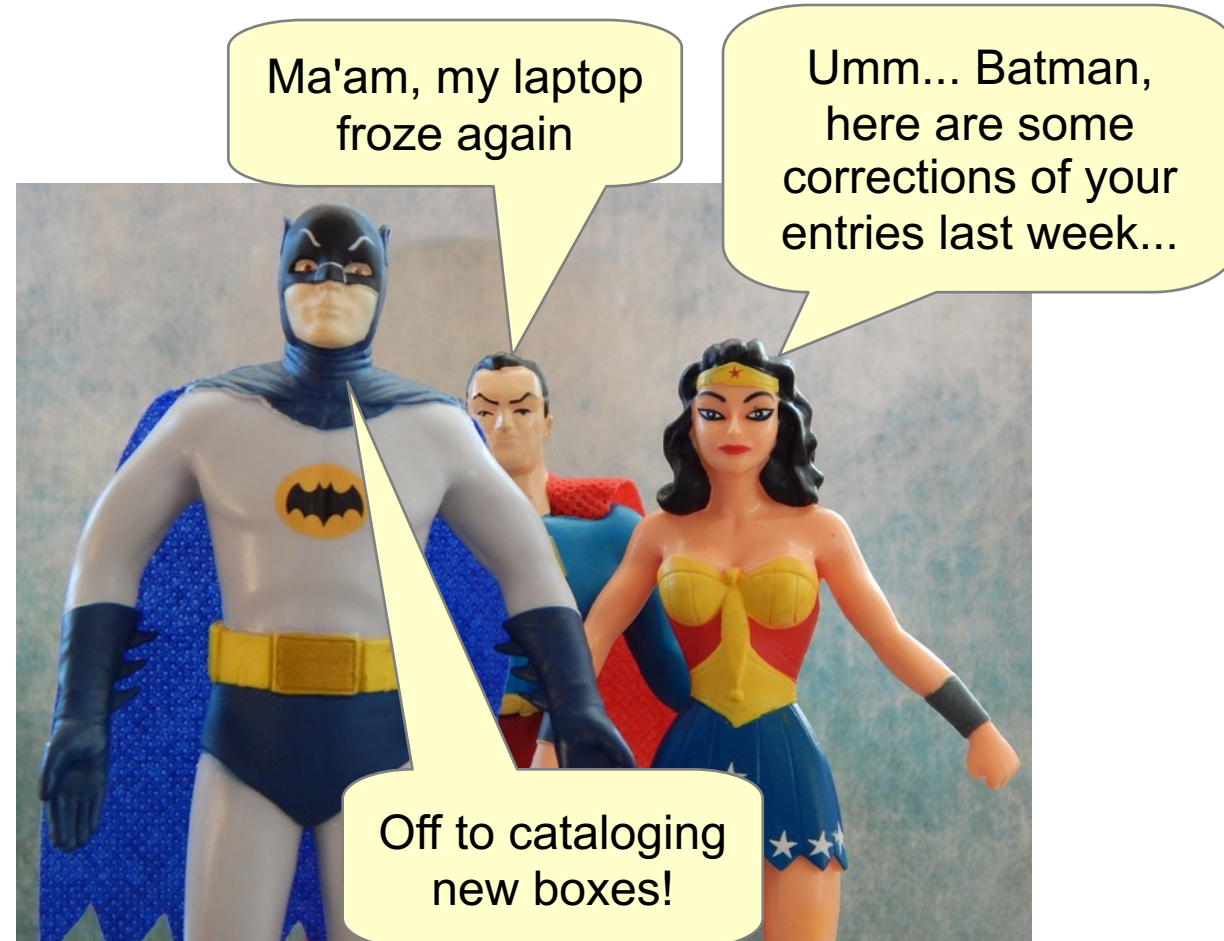I can't stand that handwriting. It makes me angry!

I'll decipher it. Would you take care of the heavy boxes instead?

The Team of Many

- Possible to delegate tasks

- Project management takes more time

- The more team members, the less likely the project manager can do cataloging.

3. Tools!

What tools do we need?

- Do catalog entries
- Keep track of deadlines
- Control budget
- Track work progress
- Track staff time (optional)
- Edit photos (optional)
- Organize image files (optional)

Software for cataloging

- Investment that pays in the long run

- Network: What do similar institutions use?

- Same size doesn't mean comparable workflow!

- Sometimes, a spreadsheet software is an option.

Tools for project management

- Controlling budget: Spreadsheet software

- Keep track of deadlines: Email software with calendar function

- Keep track of staff time: Spreadsheet software

- Managing image files: Create a clear structure

- Keep track of work progress: Pen and paper, spreadsheet software

But the most important tools for project management are:

Brain switched on

Eyes open

A simple change with big results

My desk

Printer at the most inaccessible place in the whole hall

Teams 1 & 2 in the next hall

The good project manager:

Brain switched on

Eyes open

AND

Project documentation

Questions, Answers & Feedback

May the road rise to meet you.

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