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Digital Initiatives Symposium

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Apr 25th, 12:00 PM - 2:00 PM

# Planning and Managing for Digital Projects in Libraries and Archives

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## Planning and Managing for Digital Projects in Libraries and Archives

### Session Type

Workshop

### Abstract

All library initiatives benefit from planning and structure, whether you're organizing an outsourced, grant-funded digitization project or an internal digital collections initiative that includes digitization, descriptive metadata creation, and an online exhibit. In this two-hour workshop, participants will acquire concrete skills and new approaches to ensure that digital projects of any size are completed on deadline and without issues. The workshop will also survey specific tools that assist with project management and digital projects. Project managers of all skill-levels are welcome at this workshop, although the content will be geared towards beginners and those with some familiarity in managing a digital project. The workshop will include exercises to help participants determine the scope of a digital project, write a project plan or charter, maintain an ongoing project, and close-out a completed project. There is no need to come with a project in mind, but the time spent in this workshop will give you a head start on an upcoming project.

### Comments

Dinah Handel is the Digitization Services Manager for Stanford Libraries, where she works across their digitization program to provide quality services to Stanford University patrons and the community at large. She has also worked as the Mass Digitization Coordinator for the New York Public Library, and at CUNY TV as an NDSR Resident. She has also worked on community archives projects in New York and San Francisco. She holds an MLIS from Pratt Institute in New York, and a BA from Hampshire College.

# Icebreaker

Introduce yourself in the chat by sharing your name and a question or idea you have about project management.

*Example: I'm Dinah Handel and I want to learn more about project charters.*

# Planning and Managing for Digital Projects in Libraries and Archives

Digital Initiatives Symposium, April 25, 2022

# Agenda

- ★ Icebreaker, logistics, and context setting
- ★ **Section one:** initiating and planning your project
  - Activity: fill out a draft template
- ★ Group reflection and sharing, Q&A
- ★ **BREAK**
- ★ **Section two:** executing and managing your project
  - Activity: create communication plan or identify a project management tool
- ★ Group reflection and sharing, Q&A
- ★ **Section three:** completing your project
  - Activity: 4 L's retrospective
- ★ Final group reflection, Q&A

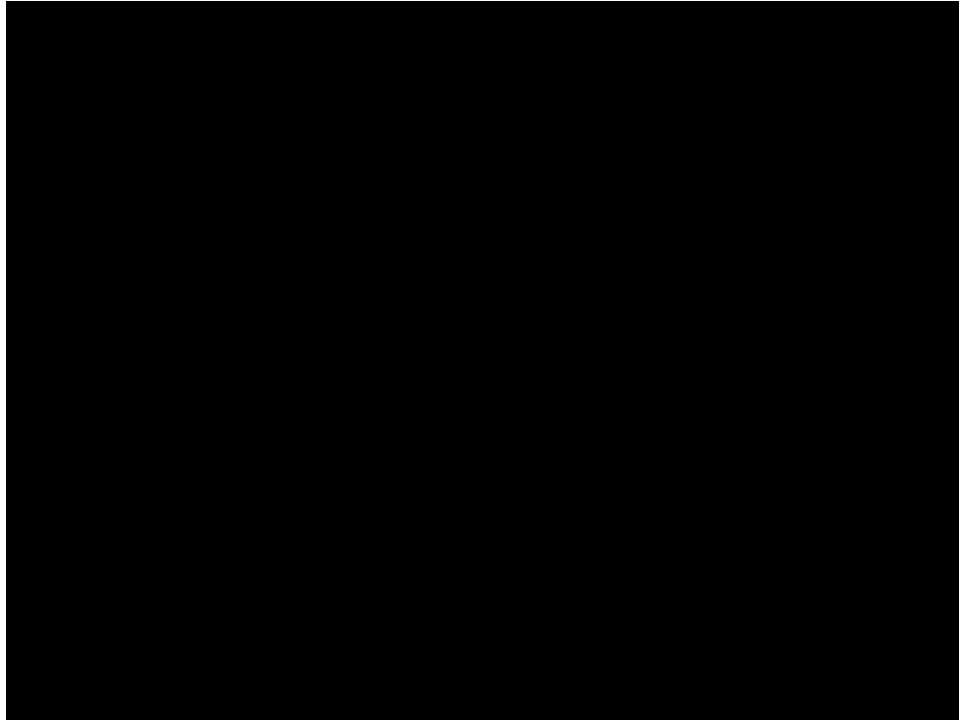
# Introduction and class logistics

My name is Dinah Handel (she/her) and I'm the Digitization Service Manager for Stanford University Libraries.

- ★ This workshop contains **lecture, independent activities, Q&A, and discussion**. There will be one **break at ~12:45 PM**.
  
- ★ **Participation:**
  - Video and un-muting to ask questions is optional.
  - Use chat to respond to questions or share ideas.
  - Raise your hand if you would like to speak.
  
- ★ **This workshop is intended to be a welcoming and productive space.**
  - Any form of harassment or oppressive language will not be tolerated.
  - All questions welcomed.

# Using the templates provided

Please use the templates provided by making a copy and saving to your own drive.



# Project management

## ★ What is a project?

- Temporary endeavor undertaken to create a unique product, service, or result.
- Defined beginning and end.
- Not a routine operation, but a specific set of operations to accomplish a singular goal.

## ★ What is project management?

- The application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

★ Project management has evolved into a discipline with many methods of project management, certification from professional organizations ([Project Management Institute](#)), and International Standards ([ISO 21500](#)).





# Five phases of project management

Initiating

You have an **idea for a project**, or more likely, someone else has an idea for a project that you will manage.

Planning

Here's where a lot of work happens: **identifying stakeholders, selecting your project team**, and defining your **project scope**.

Executing

Your project begins and you draft and follow your **project plan or charter**, secure the **resources** you need, and **identify any risks**.

Monitoring and  
Controlling

Your project is ongoing. In this phase, you are **organizing project meetings** and **tracking progress and deliverables**, and addressing any issues that arise.

Closing

Your project is complete. As you wrap-up, you are performing **quality assurance** of the project's deliverables, **drafting a maintenance plan** if needed, and **conducting a retrospective** with your project team.

# Components of a digital collections project

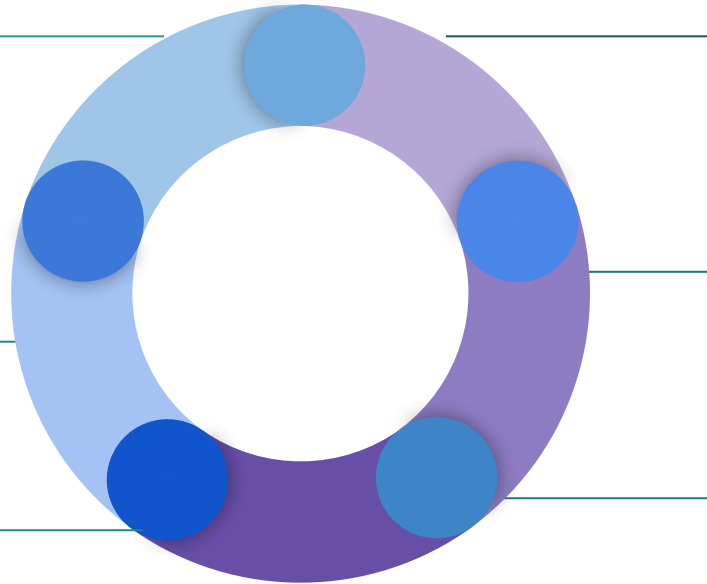
## Digitization

Digitization of physical or analog special collections, archives, or library materials, in-house or by a vendor.

## Collection acquisition

Acquisition of a born-digital collection, with the intention of long-term preservation and access.

## What else?



## Collection description

(re)Description of the materials.

## Collection access

Developing an online exhibit of digital collections.

## And more!

Reparative or anti-racist redescription of collections.  
Transcription of digitized audio/moving image materials for discoverability and accessibility.  
Implementing a new discovery or access environment.

# Questions before we proceed?

- ★ **Disclaimer:** this workshop will not cover specific styles of project management. To learn more about techniques like “waterfall,” “critical path method,” and “Scrum/Agile,” visit the Project Management Institute.



# Section one: Initiating and planning your project

- ★ Covered in this section:
  - **Project Scope**
  - **Stakeholders**
  - **Project Team**
  - **Project Plan or Charter**
  - **Resourcing and Budgets**
  - **Risks**



- ★ **Activity:** Make a personal copy of any of the templates discussed, and fill it out based on your (real or hypothetical) project.  
*Don't have a project to plan for? That's ok! Consider using a past project, or make one up!*

# Project scope

## Define

What is the purpose of the project? Who is your audience?  
What will be made possible once this project is completed?

## Timeframe

How long do you have to complete this project?

## In/Out

What is not included in the project?

## 5 W's

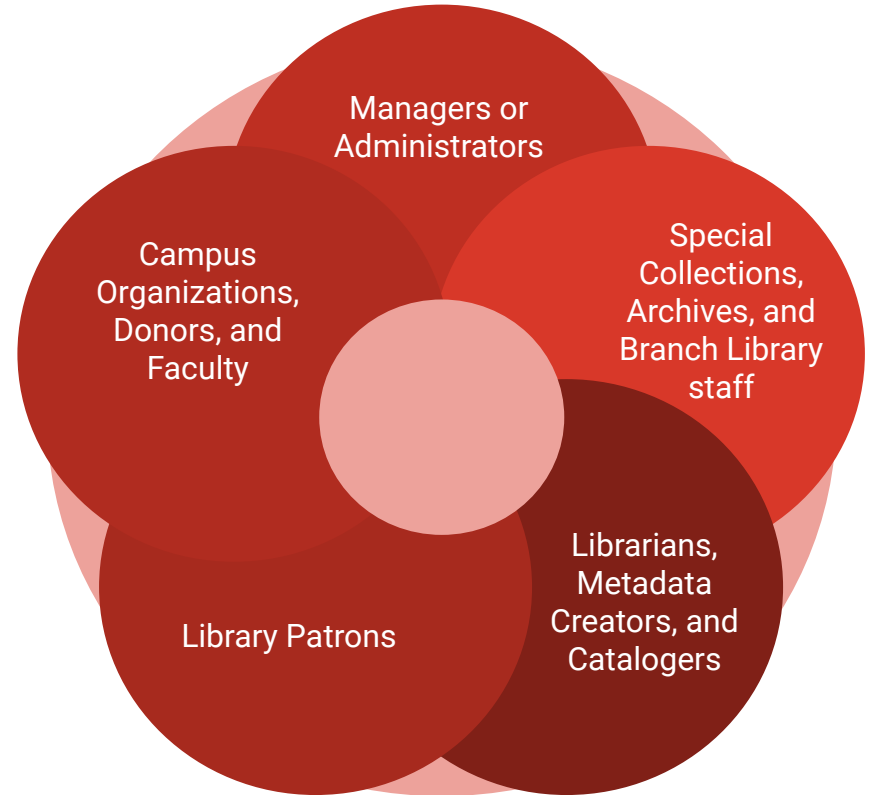
Try using who, what, when, where, why, how to brainstorm your project scope.

## Pitch

Craft a 3-5 sentence distillation of your project.

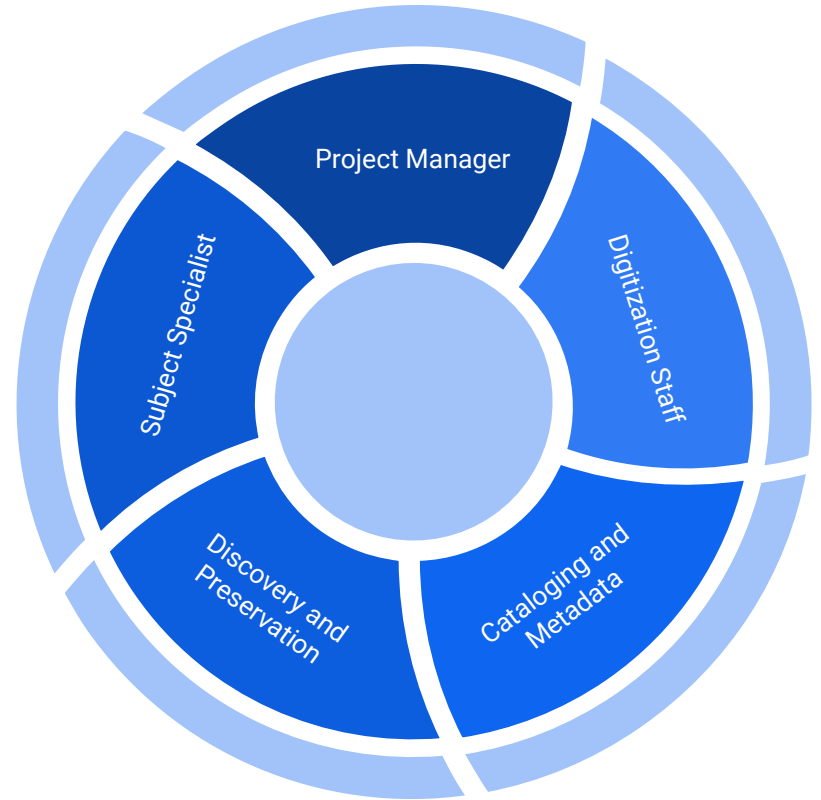
# Stakeholders

- ★ Stakeholders are **"an individual, group, or organization, who may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project."**
- ★ There are **many potential stakeholders** in library projects.
- ★ Project initiation includes **getting "buy-in" (support) from stakeholders.**



# Project team

- ★ **Who** will be on your project team?
- ★ There are **common roles** in a digital project, sometimes the same person may play multiple roles.
- ★ **Tip!** Fill out a [RACI Matrix](#) with your project team to **identify roles and responsibilities**.



# Project deliverables and timelines

- ★ Deliverables are what you will produce as a result of the project:
  - description, digitization, ingest into repository and/or discovery environment, digital exhibit, events or public programming, social media promotion
- ★ Plan your project's timeline around deliverables.
  - Some deliverables may have dependencies.
- ★ Seek input from and delegate to the project team.
  - Return to the RACI Matrix as needed.
- ★ Celebrate the completion of deliverables with your team.
- ★ **Tip!** Use the [Project Timeline template](#) provided to structure your project.



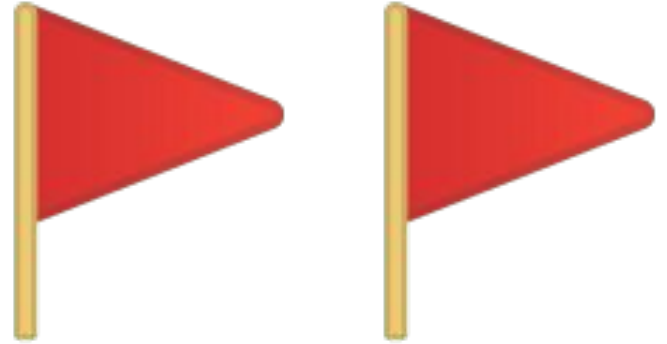


# Determining project resources and budgets

- ★ **Determine your project resources** at the outset of your project.
  - What resources do you already have?
  - What resources do you need?
  - A [resource assessment](#) can be used for advocacy and project planning.
- ★ **Managing a budget** may be part of your role as project manager.
  - Request **regular updates** from your institution's **financial services**.
  - **Track your budget** in a spreadsheet or financial tracking software.
- ★ **Assess your resources and budget frequently** throughout your project to **be prepared for changes**.



# Risk and contingencies



★ **Every project carries some risk.**

- s\*\*t happens!

★ **Brainstorm risks and contingencies** with your team. Possible categories of risk include:

- Staffing
- Funding
- Equipment
- Access to physical space or collections materials

★ **Tip:** Planning for risk can help you feel more confident about the project's success.

# Project charter

- ★ A project charter is your team's guide to the project.
- ★ Sections may include:
  - Scope
  - Objectives
  - Deliverables
  - Timeframe & Milestones
  - Approach
  - Staffing Roles & Responsibilities
  - Accountability & Oversight
- ★ **Tip:** Write [a project charter](#) as you are planning your project and have stakeholders and the project team review it.

# Planning for digitization

Receive physical materials or born-digital acquisition, or send to vendor and confirm delivery.

Preparation for repository/DAM ingest, including unique object-level identifiers, file-naming specifications, folder structure, and setting up tracking systems.

Confirm deliverables with project team, including display characteristics of digitized material.

Begin digitizing material, perform quality control and quality assurance, and track progress.

Questions?

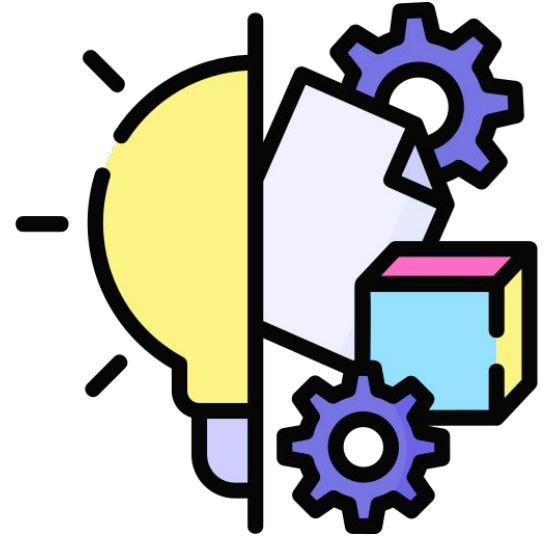
## Section one activity

Make a personal copy of any of the templates discussed, and fill it out based on your (real or hypothetical) project. Place any questions in the chat.

**Reflections?**

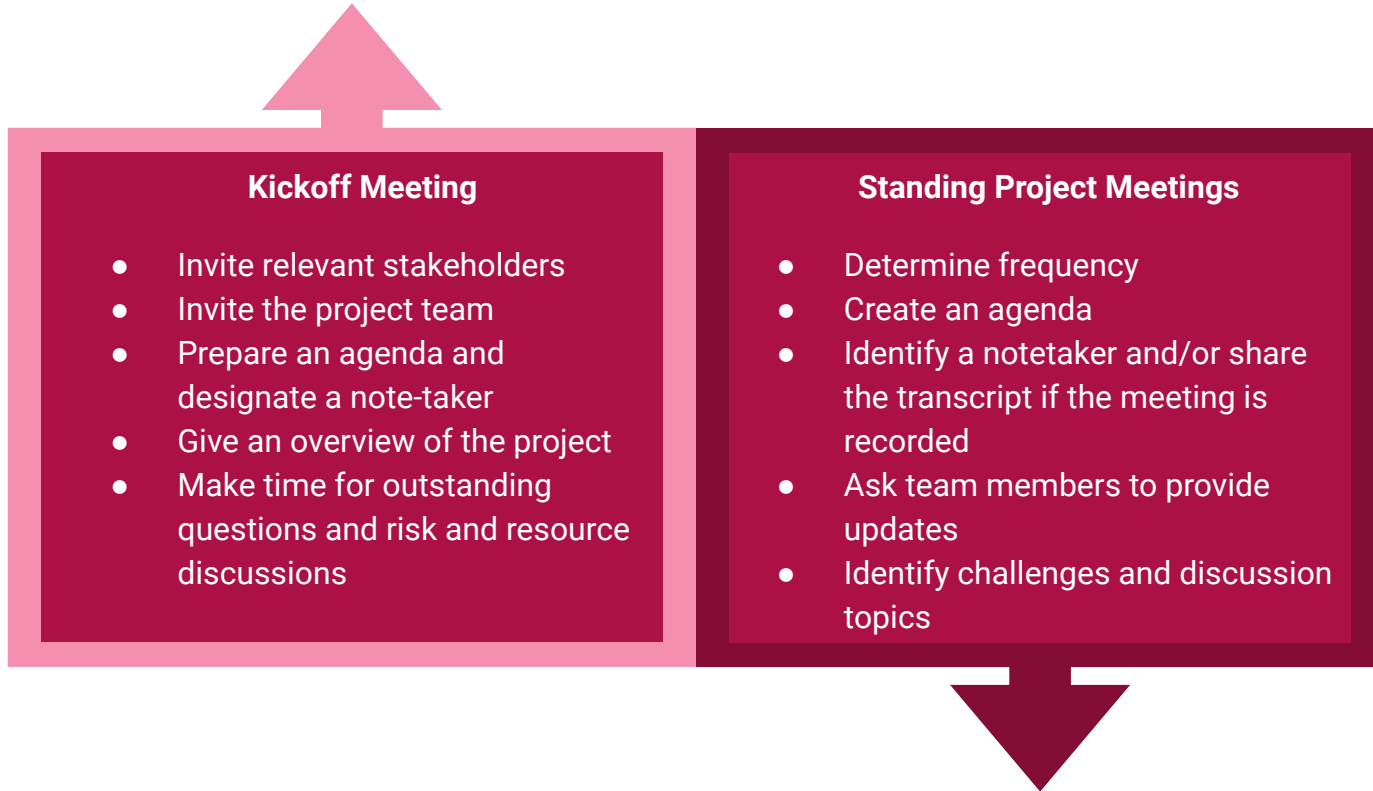
## Section two: executing and managing your project

- ★ Covered in this section:
  - **Project kick-off**
  - **Project meetings**
  - **Tracking progress and deliverables**
  - **Project management tools**
  - **Communication plans**
- ★ **Activity:** write a **communication plan** for your project **or** identify a **project management tool** and describe why it will work well for your project.





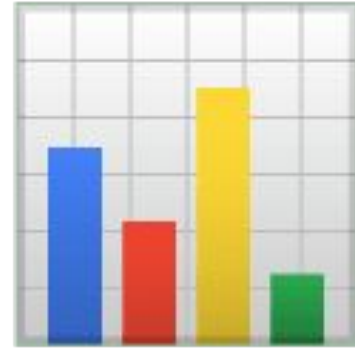
# Project kick-off and meetings



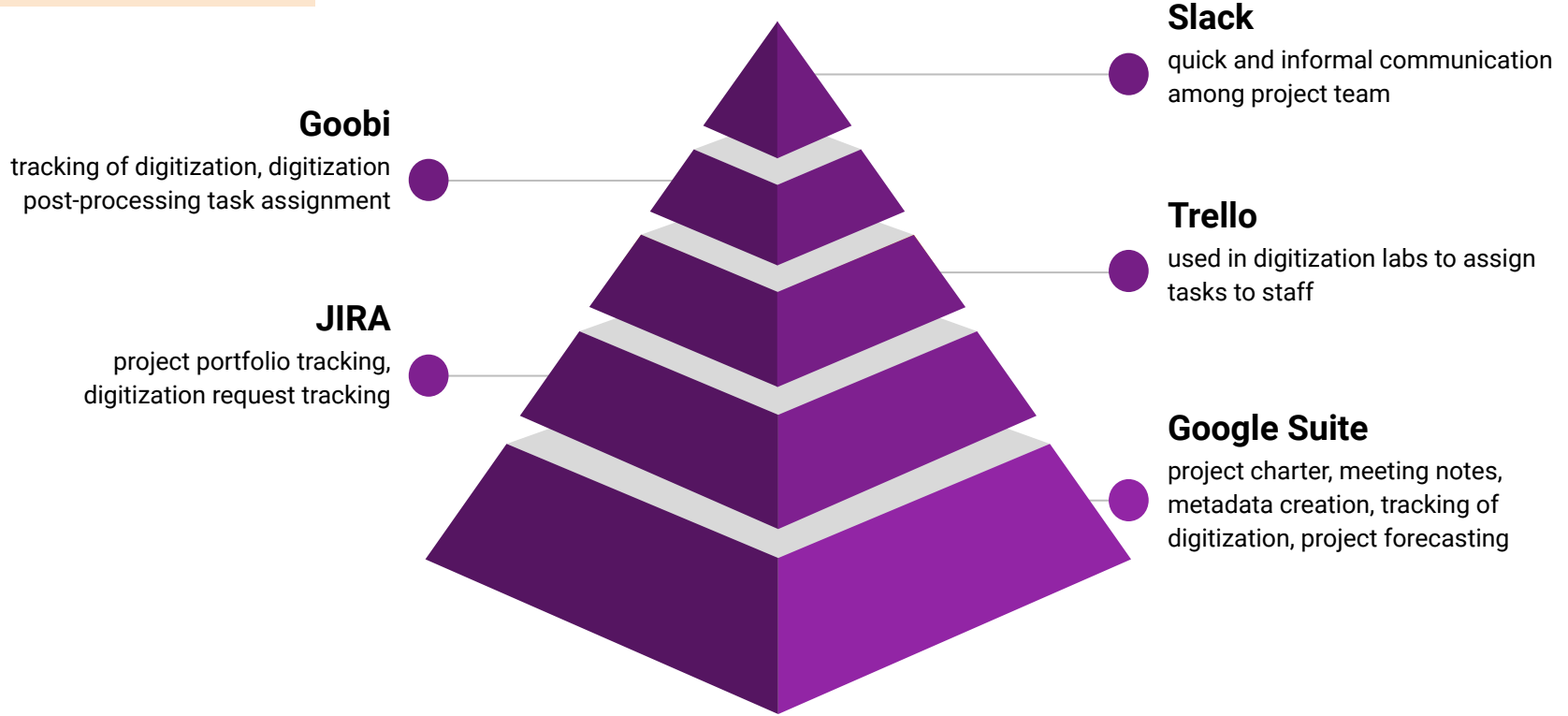
★ **Tip:** Use the [AGILE Inception Deck](#) for your kickoff meeting.

# Project management software

- ★ **Project management software** can **track and report** on project **progress**.
- ★ Identifying a tool (or tools) for project management:
  - What tools do you **already have or know**?
  - **What are you tracking**?
  - **Who** is the project management tool for?
- ★ **Tip!** Do some [product comparison](#) to find the right fit for your project.

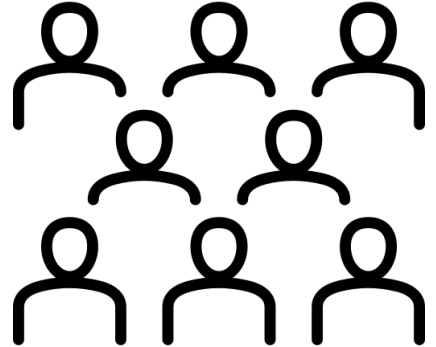
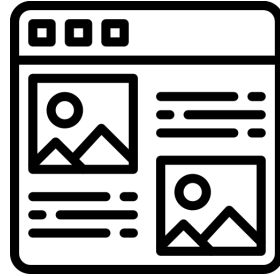
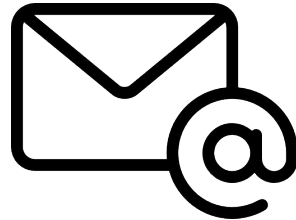


# Software I use

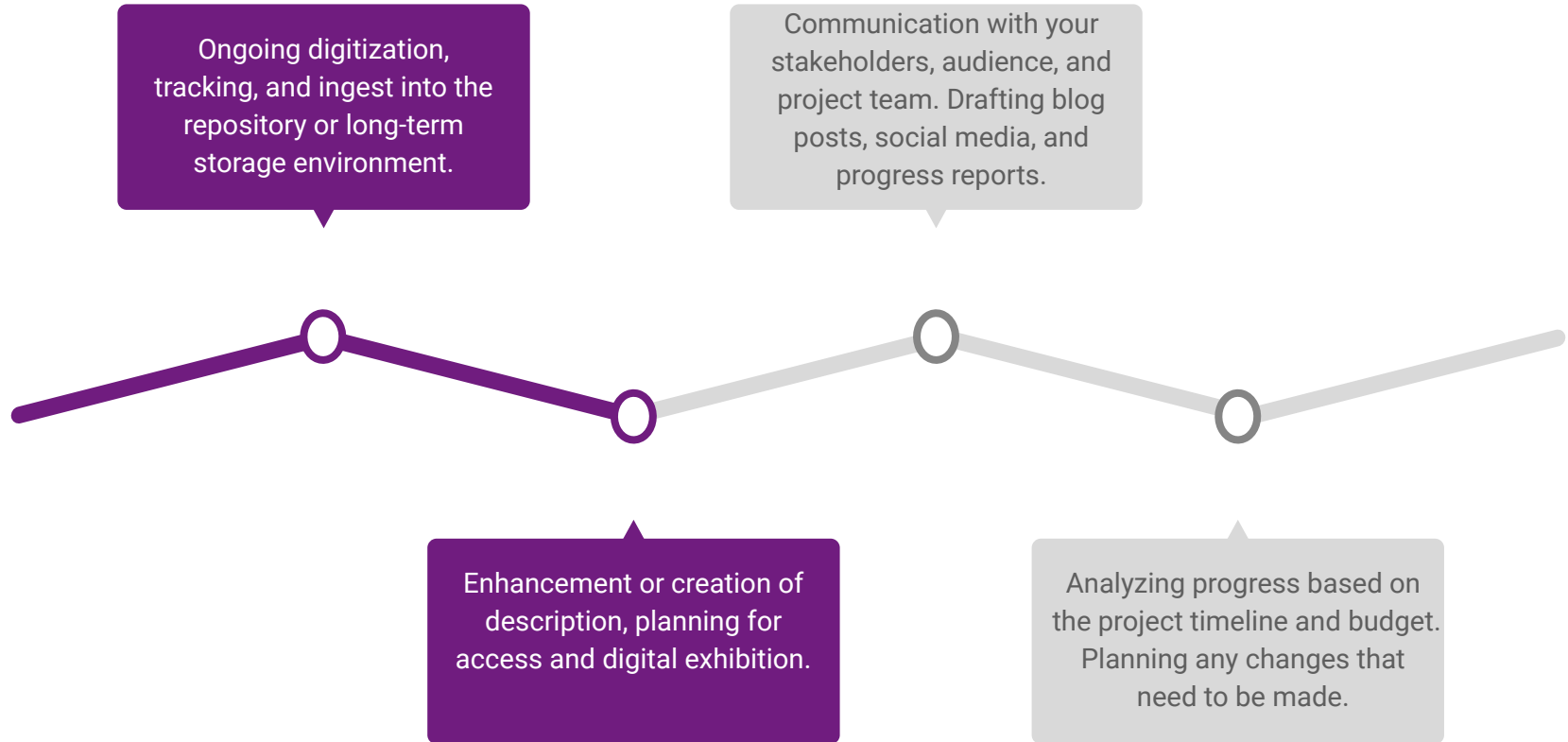


# Communication plan

- ★ A **communication plan** is used to **identify the audience, method, frequency, and messages** for your project.
- ★ **Clear, consistent, and targeted communication helps manage expectations of stakeholders throughout the project.**
- ★ Here's a [communication plan template](#) for you to try for your project.



# Ongoing digitization management



# Questions

## Activity

Identify a project management tool and describe why it will work well for your project  
**OR** use the communication plan template to draft your communication plan

**Reflections?**



## Section three: completing your project

- ★ **All projects come to an end.**
- ★ Covered in this section:
  - **Quality assurance** of deliverables or completed project
  - **Maintenance plans**
  - **Retrospectives**
  - Project management **resources**
- ★ **Activity:** 4 L's retrospective of workshop

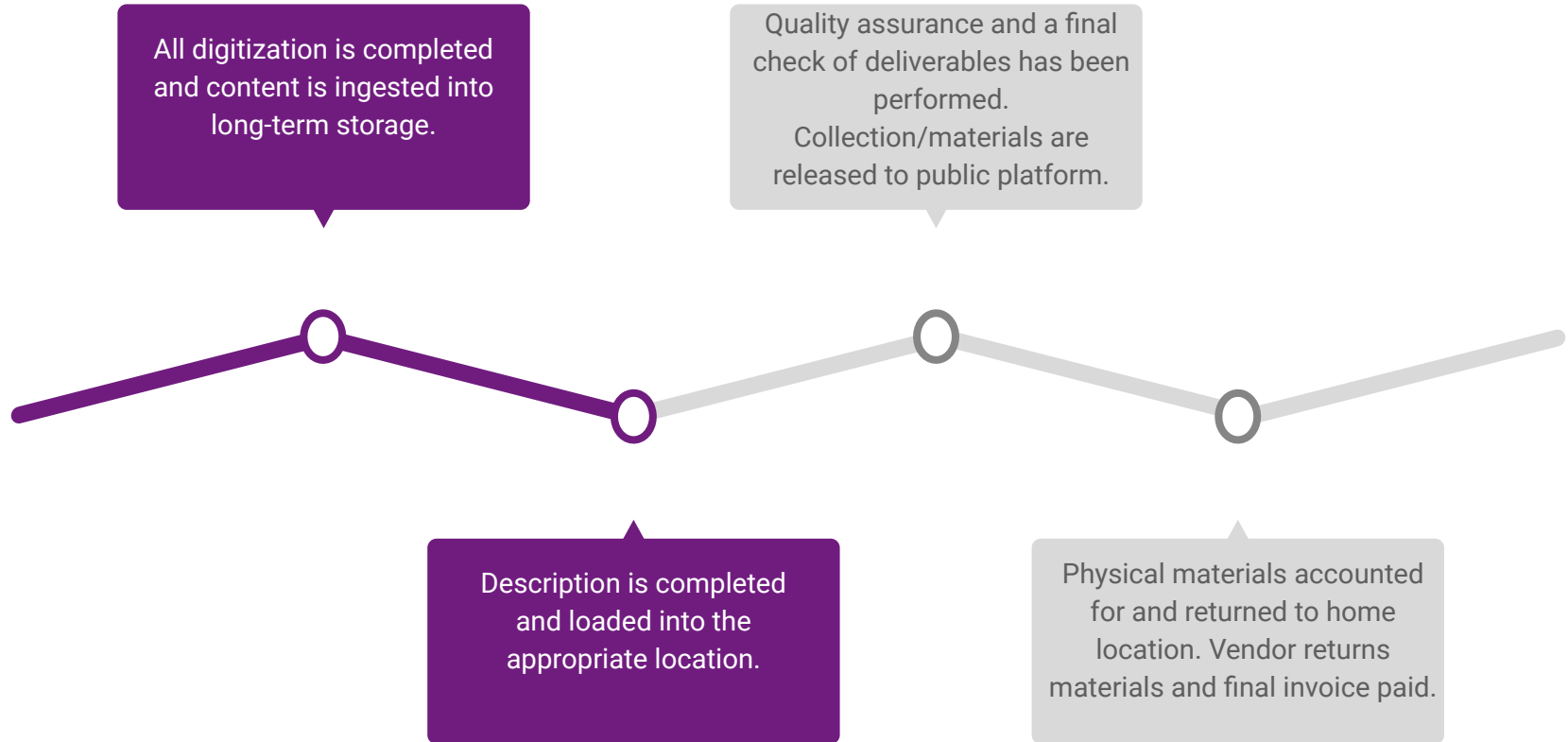


# Completing project deliverables

- ★ Did you **complete the project deliverables** as outlined in the project charter?
  - If not, what happened?
  - Grant applications may require justification for missing deliverables.
- ★ Complete a **final quality assurance step** of the digital collection and other deliverables.
  - This step should be completed prior to any public release.



# Completing a digitization project



# Maintenance plan

- ★ **As the project is wrapping up, consider if you need to create a maintenance and/or feedback plans.**
- ★ Who will be responsible for checking project functionality periodically?
- ★ Who will address user feedback?
- ★ Do you have a digital preservation plan for the digital content created in your project?
  - Consider the long term preservation of digitized audio or video files.
  - Web archiving for project-related websites.



# Retrospectives

- ★ **Project retrospectives** provide a chance to **discuss how the project** went with your team.
  - What to do differently next time.
  - Pause, reflect, and share before moving on to the next project.
- ★ 4 L's structure: Liked, Learned, Lacked, and Longed for...

Liked	Learned
Lacked	Longed for

# Want to learn more?

## ★ About

- <https://www.pmi.org/about/learn-about-pmi/what-is-project-management>
- [https://en.wikipedia.org/wiki/Project\\_management](https://en.wikipedia.org/wiki/Project_management)

## ★ Project management in libraries

- [https://wiki.diglib.org/DLF\\_Project\\_Managers\\_Group](https://wiki.diglib.org/DLF_Project_Managers_Group)
- <https://www.alastore.ala.org/content/project-management-libraries-time-budget-target>
- <http://www.ala.org/alcts/library-project-management-101>
- Harper, Valerie L., "Rightsizing Project Management for Libraries" (2018). Library Leadership and Management. 84. [https://scholars.unh.edu/library\\_pub/84](https://scholars.unh.edu/library_pub/84)

## ★ Project management for digital humanities

- <http://dhquest.dhinitiative.org/>
- <https://github.com/quinnanya/dlcl205>

## ★ Training

- <https://www.pmi.org/certifications/project-management-pmp>
- LinkedIn Learning: <https://www.linkedin.com/learning>

**Questions and final reflections?**

## Final activity - workshop retrospective

★ Complete the 4 L's survey as the last activity for this workshop

★ Survey:

[https://docs.google.com/forms/d/e/1FAIpQLScm6EgsWRg4AOr7EdpFk4fVAw\\_5kcl\\_MQwY3G\\_YlwEoMr6xVA/viewform?usp=sf link](https://docs.google.com/forms/d/e/1FAIpQLScm6EgsWRg4AOr7EdpFk4fVAw_5kcl_MQwY3G_YlwEoMr6xVA/viewform?usp=sf_link)