Where to begin: Basics of project planning for GLAM organizations

Angela Kipp
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
## Decision Matrix

<table>
<thead>
<tr>
<th></th>
<th>Hyde’s Collection</th>
<th>Waterworks Documents</th>
<th>Toys from Burkhard’s Collection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value for Research</td>
<td>**</td>
<td>***</td>
<td>*</td>
</tr>
<tr>
<td>Interesting for more than one field?</td>
<td>***</td>
<td>*</td>
<td>**</td>
</tr>
<tr>
<td>Suffering under current conditions?</td>
<td>*</td>
<td>*</td>
<td>***</td>
</tr>
<tr>
<td>Danger of deteriorating beyond repair?</td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Easy to process?</td>
<td>*</td>
<td>***</td>
<td>*</td>
</tr>
<tr>
<td>What are your thoughts on this collection?</td>
<td>I guess there are some interesting stories in there.</td>
<td>Pretty boring stuff, to be honest.</td>
<td>Would make a nice exhibit for Christmas in the reading room.</td>
</tr>
</tbody>
</table>
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.
Good project planning is about keeping resources & expectations in balance.
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

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...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 vocabulary 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

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

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

Legend  
Black = Deadlines  
Red = Fixed sequence tasks

11/5/18

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What really happens, continued

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<thead>
<tr>
<th>Date</th>
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</tr>
</thead>
<tbody>
<tr>
<td>June 1</td>
<td>Official start date of project</td>
</tr>
<tr>
<td>June 1-July 1</td>
<td>Starting phase—get comfortable with equipment; train new staff.</td>
</tr>
<tr>
<td></td>
<td>Spot issues &amp; streamline the workflow.</td>
</tr>
<tr>
<td>July 31</td>
<td>Evaluate catalog entries in both quantity &amp; quality; make adjustments.</td>
</tr>
<tr>
<td></td>
<td>Celebrate 500 catalog entries.</td>
</tr>
<tr>
<td>September 30</td>
<td>Evaluate catalog entries in both quantity &amp; quality; make adjustments.</td>
</tr>
<tr>
<td></td>
<td>Celebrate 1000 catalog entries.</td>
</tr>
<tr>
<td>November 30</td>
<td>Evaluate catalog entries in both quantity &amp; quality; make adjustments.</td>
</tr>
<tr>
<td>December 31</td>
<td>Official end date of project</td>
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</tbody>
</table>
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 occurrences...

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

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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.
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

C'mon time to catalog ALL the things!
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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