

# Where to begin: Basics of project planning for GLAM organization

## Webinar Script, January 11, 2017

### 1. Introduction

Hello! My name is Joy Banks, and I am the Project Coordinator for the CLIR Strategies for Advancing Hidden Collections six-part webinar series. Welcome to our first webinar, Where to begin: Basics of project planning for GLAM organizations. This series is offered through the generous support of The Andrew W. Mellon Foundation.

We have a few housekeeping items. Please use the chat box during our presentation to share thoughts on the topic of the webinar. If you have questions, please enter them in the Q&A box, and we will do our best to address them all. We will also have a time for questions at the end. If you have any technical issues during the event, please send a private message to Louise Gruenberg. If you are viewing this as a group, please send a private message to me with your name, email, and group count. You will be prompted to complete an evaluation when the webinar is done. Completion of the evaluation will make you eligible for a downloadable Certificate of Completion for your records. This information can also be found in the Housekeeping box in our classroom. Please keep in mind that the webinar is being recorded, including the audio, slides, and chat. Recordings will be sent to the registered participants as soon as they are available.

[Joy advance to foil 1 with schedule ]It is my pleasure to introduce our speaker for today, Angela Kipp. Angela is the Collections Manager of the **TECHNOSEUM** in Mannheim, Germany and an independent museum consultant with a special focus on science, technology, farming and history collections. She specializes in logistics, project management and the adaptation of technology for the special needs of museums. She is especially interested in finding affordable ways to improve collections care in smaller institutions. One way she does that is through her blog project **Registrar Trek**, aimed at raising awareness for collections care in general and fostering exchange between collections specialists around the world. Another way is her 2016 book **\*Managing Previously Unmanaged Collections: A practical guide for museums**. Please welcome Angela..

[Angela begins]

Thank you for the introduction and hello all.

I don't want this to be one of those "fall asleep at your desk" webinars, so feel prepared that every now and then I will ask you a question and it's time for you to add your thoughts to this topic. For that we will have a great big chatbox and you can feel free to just write down what you

think there. We will have about 5 minutes to discuss each of these question and then we will go back to the classroom to continue the lecture. Shall we try how this works for a start? Okay, here comes my first question:

[Angela foil 2]

[Angela moves group to Discussion 1, Joy starts 5min. timer]

Whiteboard-Question (3-5 Minutes to answer)

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

[Joy can give verbal notes about time. Angela will transfer important points to Notes pod. When 5 min. Is over or discussion fades, whichever comes first, Angela will move back to classroom and resume control of slides.]

## **2. Project Planning**

Fine, let's see what we've got:

(Estimated answers: fixed time frame, fixed end date, fixed goal, fixed budget, especially assigned staff)

Fine, now we got an idea what a project is. Now, let's talk about project planning.

Both, project planning and project management are big words and they are very important, but, as we put it in German:

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Don't make an elephant out of a fly.

What does this mean? It means that you shouldn't be afraid to plan and manage your project because, seriously you have already done it a dozen, if not hundreds, of times in your life. Even if you never, ever called yourself "project manager" I guess you all have organized a party on a weekend. Sure, you might never have seen this as planning and managing a project, but, in fact, it is. I will use this as an example every now and then to show you how your knowledge and skills gained from that real-life barbecue organization translates into project planning for your cataloging project.

[foil 4]

### *Understanding the difference between day-to-day operations and a project:*

Maybe the first thing you have to think about is how a project and day-to-day operations are different. You will organize a party on Saturday, because you don't have to do some day-to-day tasks on that day, the biggest being that you don't have to work (and also stuff like bringing kids to school or day care), so you simply have time to organize it. But, there are some day-to-day-operations that you still have to perform like breakfast, lunch and dinner, taking a shower, brushing your teeth,... For your Saturday project plan this means that you have to allocate the time for doing them so they fit in between all the other tasks you want to perform.

For your cataloging project you first have to look for which day-to-day operations you can stop while doing the project and which have to be carried on and have to fit into your project schedule. For example, you might stop all outgoing loans so your staff doesn't have to care about that while working on your project.

But you probably can't stop all research requests and all guided tours without acting against your institution's mission.

You have to think about how to fit the two things together. For example, you might want to announce that research requests take longer than usual on your website (hint: give researchers an estimated time frame) or you might want to hire some volunteers to do the guided tours. You also might look for what of the tasks that are usually done by you can be taken over by another staff member – but don't forget that in return this staff member needs to reduce some of his/her other tasks. More on those staffing questions will come in the webinar “Making most of people”.

[foil 5]

### *Choosing a collection for the project*

Probably the most important decision in your project is which collection to choose. Out of the many collections you deem worth to catalog, you will have to select one. When thinking about them:

- Which has the most value for research?

- Which is probably interesting for more than one group of researchers? (a correspondence of a former U.S. president might attract more researchers than the mail exchange of a local artist, for example)
- Which is suffering the most under the current storage conditions?
- Is there a collection that probably won't be usable in the future if we don't process it now? Think of media at risk of losing information like, for example, magnetic tape. The condition might be a big factor in deciding – more in the webinar about red flags.
- Which is easy to process? (This question might lead into different directions: It might be wise to choose this collection because you can gain experience and test the effectiveness of your tools on an easy to process collection and with this experience tackle the more complicated collections in a follow-up project. Or you might skip the easy collection for a time after the project when you are again left to your own devices and invest the staff time and money on a more complicated collection.)

Keep in mind that the collection you chose must be manageable with the time, staff and money you have. We will discuss those aspects later, but this might mean that you have to choose parts of a larger collection for this project, because cataloging the whole collection just isn't feasible.

You might want to discuss this broadly in your institution. The more input you get from others, the more educated your decision for a certain collection will be. Also, if people have the impression that their opinion is valued they are much more likely willing to do their part in the process.

If you do have all possible collections in mind you might want to develop a form where your staffers can give up to 3 points for all the mentioned aspects

[foil 6]

(This form is also available for download in the resources library. You may want to add different aspects to poll your colleagues):

*Example Form:*

	Hyde's Collection	Waterworks Documents	Toys from Burkhard's Coll.
Value for Research	**	***	*
Interesting for more than 1 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, tbh.	Would make a nice exhibit for Christmas in the reading room.

\* If you decided that you want to choose a collection with complex issues while you have the chance to get the necessary staff funded, you might change this into "Is complex to process"

The idea is that each staff member sees collection work from a different perspective. Others might have a better knowledge about certain aspects. By the point system you avoid that people just chose their favorite collection and are done with it but try to weigh the aspects asked against each other. The freetext field allows to make remarks that don't fit into the other

aspects. It may contain information about the collections you didn't know about and which might be helpful for decision making.

When you got the forms back you can see how the collections are seen by your colleagues. Ideally you get a clear vote, but more likely there will be something to weigh against each other. When you do the final decision make it transparent: why have you decided on one collection in favor of the other. People tend to get grumpy when their favorite isn't chosen. To maintain a good working climate it's important that they understand your reasoning.

If you are the single professional without a staff, the form might help with weighing the collections against each other anyway.

Next up, let us talk about the project goal:

[foil 7]

### *Deciding what to do and what not – the project goal*

Back to our Barbecue Saturday: when you are planning your Saturday, you take a look at what needs to be done and what you will do. It's natural that the list of things that need to be done is longer than the Saturday so, quite naturally, you are doing a selection, although I guess most of us are doing this not in a conscious way. For example, while the garage needs to be cleared out, you won't do this on a Saturday where you will throw a party. You don't give a second thought on the "why", but if you think about it, it's because you know that clearing the garage is something you won't get done before 6 p.m. You know there will be endless discussions about what to throw away and what not, there will be several times where you discover something and dwell into memories, common, you all know how these "clear the garage Saturdays" end... A mixture of experience and the ability to think about all the steps involved in a certain task let you decide not to do it on the Saturday where the barbecue takes place.

It's exactly this ability to imagine everything involved with the task in advance you need to decide which tasks your cataloging project will contain. In other words: What should be the end result? For your Saturday it will be that you have finished all the other tasks before 6 p.m. so you can relax and enjoy the barbecue. Your project needs a similar goal.

A cataloging project can have all kinds of project goals:

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- A fully processed and rehoused collection that may be digitized and accessible through a data base or catalog.
- a set of finding aids or indices (plural of index) that will give researchers an overview of what's there so they can at least have an overview and dig deeper themselves
- Minimal level database or spreadsheet some pretty generic entries, designed to be filled with more detailed information as the work continues after the project

You have to define your goal in a way that it's feasible for your institution given the available time, staff and money.

Now, let's take a look at how to do that.

[foil 9]

Good project planning and management is about keeping resources and expectations in balance.

[foil 10]

In a cataloging project your resources are the time, staff and money you have and your expectations are the number of objects to process and the depth of information you catalog.

Most cataloging projects in the planning phase start like this:

[foil 11]

Now, what can you do to get a balance?

[foil 12]

You can reach balance by improving your resources.

[foil 13]

Or by lowering your expectations.

[foil 14]

Most likely, you will both lower your expectations and build up your resources.

Next up we will look at how we can establish this balance by deciding what is a manageable project goal. So, my next whiteboard question for you to discuss is:

*How long does it take to do a catalog entry?*

[Angela moves group to Discussion 2, Joy starts 5min. timer]

Whiteboard-Question (3-5 Minutes to answer)

*How long does it take to do a catalog entry?*

[Joy can give verbal notes about time. Angela will transfer important points to Notes pod. When 5 min. is over or discussion fades, whichever comes first, Angela will move back to classroom and resume control of slides.]

Those who have answered the question will have specific collections in mind. If it's the one you will use in your project that's a good thing. If you haven't, but used your experience from former cataloging projects be very, very careful. As long as you haven't taken a close look at your selected collection, I'd shy away from giving exact numbers. My answer to this question will always be "it depends".

[foil 16]

How long it takes to do one catalog entry is defined by:

- The nature of the collection: A collection of porcelain tea services that are all from one manufacturer and where you have a whole range of product lists or catalogs from different production years as a reference will be quicker to catalog than a collection of undefined tools from a farm where you have to start off with researching what the single tools were used for and what they are called. The numbers that can be achieved will be worlds apart. In the first case you probably can duplicate quite a few records because, for example, all tea cups are the same and there are 8 of them. Only the number and the photo changes. In the second case it might take you a day to find out what a tool was used for. Well, I'm from the museum setting, but I guess for libraries it's the same if you think about mass produced paperbacks on the one hand and original manuscripts on the other.
- The numbers of required fields: I assume for a moment that you use a database. You will define what fields have to be filled. The more fields have to be filled out to assume a catalog entry complete, the longer it takes.
- The depth of required information: a full description of the object and its condition takes longer than just adding keywords and a photo. A rough estimate of a manufacturing time span is

quicker to do than giving an exact year of production (always given you have the necessary expertise to do the first one).

[foil 17]

- If there is controlled vocabulary available. If you have a list of controlled vocabulary in your database where catalogers can choose from, cataloging is quicker than if they have to add this information themselves. This is true for nomenclature, artist names, manufacturer's names,... literally everything that is repeated information (more about this in the webinar about cataloging)
- How cataloging is embedded in the workflow: does the cataloger have to get the object, bring it to his/her desk, measure it, photograph it, rehouse it, store it and record location changes him/herself or are these tasks part of another person's job?

The absolutely safest way to get a good estimate is to choose a good sample for the collection that has to be processed and run a testing phase.

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By "a good sample" I mean a part of the collection that is somehow representative. If you have a collection of kitchen utilities you neither choose the box with all the knives, forks and spoons, nor the box that only contains one cooking pot. You choose the one with a variety of things or, even better, you do your testing phase with several boxes.

Your experiment will give you a number of how many objects can be processed a day. Make no mistake – this is the average number of catalog entries that one cataloger can do, given the assumption that this is the only thing this person will do. But, to keep the balance, you have to add a buffer. This buffer must contain:

- The days away from the office that are predictable, like vacation days, national holidays, sick leave days and days before exhibit openings where you will have the "all hands on deck" scenario.
- The hours that will be missed because of meetings and other known reasons for not cataloging.
- A percentage of buffer for the time when the database doesn't work, the computer needs an update, there is an emergency call to all colleagues because there's a tornado approaching... What that percentage will be is the big "depends" as it really depends on the circumstances. I'd suggest to work at the very least with 10%.

In general, I'd suggest to be very careful with communicating those numbers.

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You as the project planner will need these numbers to calculate if processing the collection within the given time frame is reasonable. But when communicating them, it's very easy to achieve something bad and really hard to achieve something good.

When you give out a number that has to be achieved by a cataloger each day, you create an impression of a factory. You produce a number of files each day. But that's not what cataloging is about. Cataloging is about recording information accurately, in a way that it is correct, both in typing and in truth to the best of our knowledge. It has to do with the will to make it right, not with the will to beat some numbers. If you give out numbers that have to be achieved some people will try to beat the number because the sense of competition is strong with us as human beings. But, in this effort, people tend to become sloppy with the information that is recorded.

Other colleagues will become demotivated because they feel a given number of objects to catalog is reducing their work to that of assembly line workers and is disrespecting their knowledge, ability and creativity. Never underestimate the damaging factor of colleagues feeling not valued and their knowledge not respected. They might deliver their set numbers, but will have lost the will to deliver really good and valuable catalog entries and won't care if they make mistakes.

But there's more to it. Everybody who has ever done cataloging knows that there are easy cases and hard cases. With a fixed number to achieve each day people might feel pressed to skip necessary research or reduce it to a minimum – losing the chance to record valuable information for future generations of researchers.

When you feel like you have to communicate numbers, remember a psychological fact: It's more satisfying to beat a given number and finish a project faster than falling behind a given number time and again.

To get to the most realistic numbers, extend the testing phase to all steps involved. To do that, you first have to think about what steps towards the project goal are involved.

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### *Choosing the steps towards your goal*

To reach your goal you will have to take certain steps. Some steps just need to be done, no matter when you do them. But most steps have to be done in a certain sequence that makes sense. Taking your Saturday, you can't make the salads and hamburgers you want to eat at your party before you get the ingredients from the supermarket and you probably can't mow the lawn first thing in the morning when the grass is still wet. If you look at the steps that do have a logical sequence, the tasks who haven't will fall into place quite naturally.

Well, I say "naturally" but this is indeed a crucial part of your project planning process. We probably all have those Martha Stewart types of friends who are always perfectly organized and when they invite you over for barbecue the garden is decently decorated, there is a selection of games for the kids, the buffet has an international selection of snacks and your friend looks like Miss World. And we probably also all have those friends who invite you over and when you arrive there is frenzy activity, your friend running around, hair still wet, something smells suspicious from the kitchen and you are asked if you can drive to the supermarket because there is not enough ketchup. While I don't mind how you organize your Saturday Barbecue, I think for your cataloging project you should strive to plan it more towards the Martha Stewart end....

So, what you have to do for your cataloging project is to think about all the tasks involved. Then, you have to order them in the sequence that makes the most effective workflow.

I'll give you an example from a museum setting, for archives and libraries it might vary, but the goal is the same:

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1. give the object a number
2. do catalog entry
3. take photo – this usually won't be necessary in an archive or library
4. rehouse object – in an archive you will probably just put a number of items into the same new archival box or folder

## 5. store object

When you have repeated this task X times, you have reached your goal.

[foil 22]

When you look sharp, each of these steps or tasks does have its logical place:

1. You assign a number first so the object is clearly identifiable and distinct from all the other objects. You will need a clear identifier for all the following steps.
2. You do a catalog entry (we have talked about the details already and more is coming in the webinar about collections access) so you have made the object accessible.
3. You take a photo so you can identify the object easily and researchers get an impression without having to access the object physically. In fact, this step can be exchanged with step 2 if this makes more sense in your workflow.
4. You rehouse the object so it is safe to store it (it wouldn't have made much sense to rehouse it before you take a photo and catalog it, because you would have to unpack it again. But then, there might be exceptions to this rule...
5. You store the object (and record the location, of course)

*How will you organize it?*

Some people assume that with these steps we have taken so far, the project planning phase is completed. I assume it's the same people that greet you with wet hair on Saturdays...

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If you want your Saturday run smoothly, you will check certain things beforehand. For example, you will look if your lawn mower still has fuel, you make sure that all family members are available to help with the tasks and of course you will have invited people for the party a few days before Saturday and checked if they will come. In other words: you made sure that you have all necessary material and staff and have limited some uncertainties that have to do with reaching your project's goal – the number of people who will come to the party will typically affect your shopping list for the supermarket.

To make sure that your cataloging project runs smoothly, you have to take a close look at what you've got so far and find out what you need to make a start. Things to consider:

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- What materials will you need?
- What tools will you need?
- What is available in terms of staff? Do you have to recruit additional staff? If so, can you recruit them yourself or do you have to work together with HR or some city officials for it?
- What has to be done before the project officially starts (waiting for grant being approved, setting up the database, get necessary literature, create sample record entry...)
- ...

More of this will be discussed in the next webinar about building resources.

### *Creating a project schedule*

Time always played a role in your planning process. However, so far we haven't talked about creating your schedule. For your Saturday Barbecue you probably never, ever created such a thing, because you know how long some tasks take and you know that, whatever happens, at 6 p.m. you will receive your guests and no matter if you are a good barbecue planner or not you and your guests will have a lot of fun. And, seriously, you can always ask a friend to drive to the supermarket to buy some more beer...

With your cataloging project, that's a different story.

[foil 25]

You should set up a schedule so you make sure you are not missing something important and you can manage the project. Start with the fixed dates you have: this might be the board meeting where the project gets approved, the date the grant recipients are announced or the date where you want the project to be completed. This might look like this:

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 15, application must be sent on 12 <sup>th</sup> to make sure it arrives on time (hint: even if submissions are in

	electronic form, always choose a few days before the deadline because your computer will always play tricks on you if you are under time pressure)
May 15	Grant nominees are announced
June 1	Official start date for project
December 31	Official end date for project

In our scenario we assume that the board decides on whether or not the project will take place. They will fund the money for the needed materials and tools. However, if you can hire additional staff or not will depend on whether the grant is awarded or not.

Now, In between those fixed dates you can fill in other dates for bringing this project to a success:

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Until January 12	Write project outline. Compile list of needed materials and 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	Writing grant application, talking with staff about project, maybe do a presentation about the project and its goals for all staff members, buy tools and materials.
March 12	Deadline for Grant is March 15, application must be sent on 12 <sup>th</sup> to make sure it arrives on time (hint: even if submissions are in electronic form, always choose a few days before the deadline because your computer will always play tricks on you if you are under time pressure)

March 12-May 15	Set up the working space. Do test runs and sample catalog entries. Train the staff that is already on board. Learn to use new tools. Try to spot issues with the chosen collection. Write job announcement, prep HR in a way they can start the hiring process as soon as your institution gets the grant.
May 15	Grant recipients are announced
[Skip to next foil 27]	
June 1	Official start date for project
June 1-July 1	Starting phase, getting comfortable with equipment, train new staff, spot issues, streamline workflow
July 31	Evaluate catalog entries both in quantity and quality, do adjustments
	Celebrate 500 catalog entries
September 30	Evaluate catalog entries both in quantity and quality, do adjustments
	Celebrate 1000 catalog entries
November 30	Evaluate catalog entries both in quantity and quality, do adjustments
December 31	Official end date for project

This one is just an example and yours might look a lot different. What's important is that you have an idea what you will do in between dates where you are waiting for something that will decide how the project will continue. If you wait with the preparation of the hiring process until you know you get the grant this will delay your project, for example. Balancing between not investing too much time into a project that might not come to pass but still being prepared enough to act when it gets approved is a real art, so don't worry if you did too much or too little. You will do better next time.

Note that there are some points with no fixed dates where you expect to hit certain milestones like the 500th catalog entry - don't have a fixed date for it but plan ahead what you will do to celebrate with your team - or how you will reward yourself if you are a team of one.

Note that after the project starts there are a few points where you stop, look at the results and decide if there is room for improvement. This is essential for project management, about which we will be talking now.

### 3. Project Management

But, as you might have realized this was a huge chunk of information, so let's walk around, stretch and discuss the question:

[foil 28]

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

[Angela moves group to Discussion 3, Joy starts 5min. timer]

Whiteboard-Question (3-5 Minutes to answer)

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

[Joy can give verbal notes about time. Angela will transfer important points to Notes pod. When 5 min. is over or discussion fades, whichever comes first, Angela will move back to classroom and resume control of slides.]

Short discussion about the answers. Possible answers:

- Controlling catalog entries
- Organizing new material
- Taking care of broken equipment = organizing replacements, find a service technician
- Controlling project goals
- ....

To take a closer look at what a project manager does in a cataloging project let's get back to our scale where we balanced our resources and our expectations.

[foil 29]

One of the big mistakes in project planning is to assume that once this scale is balanced, it stays that way.

But we all know that reality and mother nature really don't care about our plans. In your project planning process you will try to eliminate the most uncertainties and have a contingency plan for some of the things that might go wrong.

When you think about your Saturday barbecue: If it never rains in August in your area but exactly on the Saturday you planned the barbecue it begins to pour in the afternoon, you change the place of the party to indoors and probably use the grilling function of your oven instead of the outdoor grill. That's contingency planning that will keep your project in balance. But you need someone who takes care of keeping that balance. That's the project manager.

[foil 30]

A big part of project management is making sure the project stays on track. For your Saturday barbecue you create a shopping list before you send your partner and the children to the supermarket because you know that otherwise you have heaps of chips and cookies but not the necessary ingredients for the salads. That's project planning. When they come home you check if they bought everything that was on this list. If they haven't, you either change to a different recipe for your salad or send your partner back to the supermarket to buy the missing ingredients. That's project management.

As a project manager you also have to react to the things that don't have a contingency plan because even the best planner couldn't possibly foresee them. If you planned that your teenage son will grill the hamburgers and his girlfriend will serve the guests but the girlfriend leaves him Friday evening and he just doesn't feel like being among people you will have to do the grilling and serving part yourself or have to assign it to your husband or some of the guests.

So, now we take a closer look at how project management looks for your cataloging project:

[foil 31]

The project manager has to react to unforeseen occurrences like for example when a staffer falls ill.

[foil 32]

One way of reestablishing the balance in this case is to do it on the resources side. Here you can either hire someone new or shift the deadline for the project.

[foil 33]

You can also work on the expectations side by either lowering the number of objects that have to be processed or limit down the number of fields to be filled.

[foil 34]

It is also important to know that good project plans always work with a certain amount of buffer to react to the unforeseen. In our example our project goal can still be reached if staffers work only 90%, we got a time buffer of 4 months and some wiggle room in the budget.

In a way, the project manager is like a parent of the project. He or she just cares for everyone and everything. He or she keeps the project on track. If there are issues, he or she tries to find solutions.

You shouldn't underestimate the time project management takes in a project. It varies depending on the size of the project, the complexity of tasks and the number of people involved. You should realize there is a huge difference in project management depending on the size of teams:

[foil 35]

### *The One-Woman-Show*

Here you are cataloger, database manager, photographer, art handler, human resource officer, administrative officer, secretary, press officer and janitor in one. Given the many hats to wear this means both: a huge burden because you have to do everything by yourself without being able to delegate tasks and a great amount of liberty because you are relatively free in deciding what you do and when you do it.

In this scenario the project manager hat is just one of many. You should be aware of the fact that this always takes a big toll on your ability to get actual work done. Don't expect you can create the same amount of catalog entries as you have determined in your testing phase. The cases where you can stay on cataloging the whole day are very few and more likely than not you are doing several tasks parallel. You can expect your productivity to be below 50% of what a person can do who is just doing catalog entries.

Professional hint: try to block certain hours or – preferable – days for cataloging. You will produce a lot of nonsense catalog entries when you are working in a busy environment and are expected to do several tasks simultaneously. You could reserve certain calm hours of the day (for example in the mornings or after most colleagues/visitors left) or days that are known to be slow days (i.e. Fridays) for cataloging. Make sure you communicate those to your colleagues and make sure your phone is redirected to a colleague and you don't have email access so you can work concentrated on cataloging.

### *The Team of Two*

[foil 36]

Just like every relationship, it can be a dream or a nightmare. In the best case you have two people who complement each other to a powerful dream team, in the worst case you have an ongoing battle between two egos that takes a huge toll on productivity.

To make this one work it is important to set the relationship clear at the very beginning. Is one the boss and the other the assistant? Is one the content specialist and the other the project manager? Is one the techy who can fix everything and the other the people's person who gets to handle the outside communication? Is one good in spell checking while the other is good at seeing the big picture? Are you both cut from the same block so you like the same tasks and hate the same things so you need to figure out which one does what? Make sure you talk about issues, likes and dislikes before you start the project. Get to know each other because the success of your project will depend on your relationship.

Professional hint: you are probably more powerful if you team up instead of doing separate cataloging. In practice tests at the TECHNOSEUM we found that teaming up increases speed in many processes. We found that if one person did work like measuring and reading numbers from labels and the other was typing them into the database they were able to do 3-4 catalog entries in a time where one person could create just one.

### *The Team of Many*

[foil 37]

If you have more colleagues you can delegate more tasks, which is awesome. On the downside: the more people in a project, the more likely the project manager will need one to

dedicate most of his or her time on just project management. In a team of many there will be a lot of catalog entries to check, technology problems to solve and interpersonal conflicts to settle. Be aware that the project manager has to spent most of his or her time on project management and so might not be able to do cataloging at all. If you need the project manager to also do cataloging, find ways that he or she has some quiet hours or a quiet day where he or she can work on her own without being disturbed.

Next up, what you all been waiting for: we will talk about what tools help you in project management.

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#### **4. Tools**

When there was the survey about what to do in this webinar series, there was a high demand to have a webinar about “tools”. Now, I love tools, they are wonderful, powerful, no matter if you think about tools for woodworking or tools for your computer. Having the right tools to do a job is one key to success.

However, I often feel there is a kind of magical thinking when it comes to tools in cultural institutions. A strong belief that if we only had the right tools, every problem will solve itself. If we only had a sophisticated database like the Archive in Sampletown we would have all our collections cataloged. If we only had a powerful project planning software, all our exhibit installations would run smoothly. If we only had QR-Codes all our location tracking problems will be resolved.

One of the things I have to do time and again, both in my day-time job and as a consultant is to debunk this myth. Tools are great, but they are what they are: just tools, nothing more. It doesn't make any sense to buy tools and hope they will solve the problem. You have to go the other way round: your first question has to be: what do I want to achieve? Your second thought: how can I achieve it? And then: what tools are available to help me with that task? What do they cost? Is it worth the investment?

When you are planning your project you will come to find that there are some tools that are absolutely necessary and some that are nice to have but not necessary. When thinking about it,

think that every new tool you use always means that you have to invest not only in the tool itself, but also in getting used in handling it and in training your staff to use it. Using tools you already have almost always means a reduced training effort.

So, seriously, for a cataloging project, what tools do we need?

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- We need something to do the catalog entries
- We need something to keep track of deadlines
- We need something to control our budget
- We need something to track of our work progress
- We might need something to track staff time
- We might need something to organize our image files
- We might need something to edit our photos

The good news is that while there are great, specialized tools for all those tasks you can do all tasks with your standard office suite and free software as well.

Now comes to play that while a cataloging project can be challenging, at the same time it isn't very complex when it comes to project management. Most of the time the number of staff involved is low and the tasks are very clear and done in-house, so there are not those complex tasks of fitting different time-frames and schedules together you would have when you are organizing a move, an exhibit installation or a building measure.

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### *Software for Cataloging*

Maybe the only task you really should look out for a professional software to do it is the cataloging itself. It pays in the long run to have a good database. Having a defined cataloging project with maybe some extra money is exactly the right time to choose one. Out of the many out there on the market, make sure you find some that fits your needs best. There is a list of common mistakes to avoid in the resources section.

Before you choose, try to contact colleagues from institutions that are roughly your size and who have a comparable work-flow. A database can be great for managing archival material but suck for managing museum objects and vice-versa. A colleague from a large museum might be

totally impressed by the possibilities of a database to manage loans and condition reports which won't help you anything in your small town library.

Also, keep in mind that not all institutions that are roughly your size have the same profile in their work. The archive in town A might be closely attached to the university and have a lot of research requests from students while the archive in town B might not have much research requests but work closely with the town museum for exhibits. Therefore the archive in town A might choose the database system used by the university library while the archive in town B might prefer to use the same database as the town museum.

If you don't want to invest into a database now (and I really recommend to invest into this!), you can also use a spreadsheet software like Excel. Make sure that it provides the possibility to export data as .csv (comma separated values) and .xml (extended markup language). It will help hugely when switching to a commercial database system later.

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#### *Tools for Project Management*

For planning and controlling your budget any old spreadsheet software will do. If you have an office suite it will contain Microsoft Excel for that. If you are looking for a free alternative I can recommend the Apache Open Office suite. The Calc software will provide all the functionality that Microsoft Excel has and if you know Excel, it's a very easy transition. You can also save your documents in the .xls format so you can interchange your docs with colleagues who use the Microsoft version.

To keep track of deadlines I never needed any more functionality than my email software gave me. The Microsoft Outlook suite, as well as the free Mozilla Thunderbird as well as any other email software I have ever encountered allowed to define dates and tasks with a reminder function. You might prefer to use a separate calendar software. What I like about doing it in the email software is that I can just copy important messages from mails into the calendar and send reminders out of the calendar to other colleagues. As long as you are consistent in entering all the dates and tasks with suitable reminders here, you don't have much to worry about. Indeed, most deadlines aren't missed because of the sophisticated project management software failing, but because people have forgotten to note the due date in their calendar or have forgotten to place enough reminders for pushing their weaker self to work on the submission.

To keep track of staff time I found again that any spreadsheet software works just fine. When it comes to scheduling people I use the calendar function of my email software, but you can also do this in a calendar software or even in your spreadsheet software.

What software to use for photo editing and storage of photos and to organize your files seems to be a question of personal beliefs. I don't want to dig into this too deep, because this will be mostly a topic for those working in museum collections, not for the libraries and archives people. For the management of image files I found that having a clear structure helps a lot. If you have the possibility to rename the photos to the ID of the document or object immediately you have quite a quick reference and easy search tool. Otherwise it helps to store images into folders with the date of creation and maybe an accompanying "telling name" like "Box 1 of Hyde's Collection". You might want a more sophisticated management tool if you create a whole lot of photos, then I would seriously research image databases with just as much effort as you researched your cataloging database.

To keep track of the work progress I never needed more than pen and paper, to be honest. You will check the database (or spreadsheet) every now and then to see how you estimated cataloging numbers match up with the real cataloging numbers. If they don't fit it's usually a sign that something is wrong. Either your estimate is rubbish (which might be the case more often than you wish it were) or something is wrong with the work-flow.

That's why the most important tool for project management is...

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...observing your workflow with open eyes and your brain switched on.

It's amazing how little things can slow things down. When we were doing a large cataloging and packing project in preparation of a large collections exhibition in 2013 sometime halfway in the project I made an observation:

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We had two cataloging and packing teams working in the storage hall and an office upstairs. So, every time a team had packed a box they hit the "print" button on their laptop and one of the colleagues walked upstairs to the printer near my desk to fetch the packing list and walk back to put it in the box. This always took about 3-5 minutes and would happen about 20 times a day. In other words, about 1 ½ hours a day were wasted on walking time. But no one had realized this. Now, the thing is that I was doing mostly project management, just a few cataloging tasks and most of the time no packing at all, at least not at my desk. So I used the printer maybe two times a day. And then, as the project manager I would often go downstairs to the teams. After I realized this, I immediately took the printer out of my office and placed it at a point that was convenient to reach for both teams to print their packing lists. It didn't increase my workload at all, but saved about 1 ½ hours each day at both teams.

This is to say that the most important tool that you have in project management is your gift of observing things. Look how the teams work, if you are a team of one, take some time every now and then when you don't pay attention on what you catalog but on how you catalog. This will save more time than any sophisticated software.

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### *Project Documentation*

As a last tool to speak about: You really should create a document at the beginning of your project where you write down decisions and observations you made. Time and again you will ask yourself what exactly you thought when you choose to do things that way or you will not remember what the exact problem with cataloging this or that item was. Save a time and the end of each day to take down notes of what happened, what you decided and why and what thoughts and ideas you had. It doesn't matter if this is not written in full sentences and it doesn't have to be grammatically correct. It's just something like an enhancement of your brain to turn to as reference. You will find this helps tremendously in project management and especially if you have to write a report about your progresses and hurdles to upper management or a grant institution.

## **5. Questions & Answers, Feedback**

Now that we have come so far it's time for your questions.

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This is also the opportunity to give us as the organizers and speakers of this webinar series feedback about what to improve in the future. What elements should we use more? Which were confusing? It's your turn!

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[Angela] If there are no more questions, I like to hand back over to Joy for the last words. But before that I want to say thank you for listening and remind you that the most important tools to make your cataloging project a success are tools you already have: it's your brain, your heart and all your senses.

[Joy reveals hidden slide pod and hidden Links pod and says] Thank you Angela and everyone for a great session. Please be sure to complete the webinar evaluation while the content is fresh in your mind. You can access the evaluation using the link visible on the screen or wait to be

redirected when the webinar is ended. The evaluation link will also be available on the website with the recordings. Live participants will also receive the link with their email containing the access link for next week's session. Please join us at the same time and place next week for the second webinar in our series: Building resources and relationships: Determining what and who you need. Have a great day!