

Welcome to the CoSA Member Webinar!

June 28, 2018



PROJECT MANAGEMENT, Part One

Dr. Sharon M. Leon

Use the chat box at the right of the screen to tell us who you are, where you're from, and who is participating with you today.

You can connect to the audio portion of today's webinar through your **phone line** or through **VoIP**

PRESENTERS



Sharon M. Leon, Associate Professor
Department of History
Michigan State University
East Lansing, Michigan



John Metz
Deputy Director for Collections and Programs
The Library of Virginia
Richmond, VA

TODAY'S AGENDA

- Welcome
- Project Management, Part One
- Q and A
- Upcoming Programs and Webinars / Announcements

BIOGRAPHICAL INFORMATION

- Dr. Leon has a Ph.D., American Studies, University of Minnesota
- Associate Professor, Department of History, Michigan State University
- Over 13 years, George Mason University, History Department at the Roy Rosenzweig Center for History and New Media as Director of Public Projects
- Oversaw many award-winning collaborations with library, museum, and archive partners; served as a Director of the [Omeka](#) web publishing platform.
- Currently, on a NEH digital publication fellowship, working on a digital project to surface and analyze community networks and experiences of the cohort of people enslaved and sold by the Maryland Province Jesuits in the 18th and 19th centuries.
- Simultaneously, building a major methodological project on doing community engaged digital public history.

PLANNING IS EVERYTHING

1. Qualities of Project Management
2. Needs Assessment
3. Stakeholders
4. Resource (Asset) Assessment
5. Piloting and Estimating
6. Project Charter

PROJECT MANAGER AS LEADER

Project Manager offers:

- Clear Communication
- Motivation
- Oversight
- Accountability
- Clean-up

All of this requires trust and cooperation.

NEEDS ASSESSMENT

- What is the goal of the work?
 - Institutional goals
 - Shared issues of the field
- What are the outcomes?
 - Outcomes are different than deliverables
- What is the scope?
- What should we do?
- **What shouldn't we do?**
- What can we sustain?

STAKEHOLDERS

Who needs this project? Why?

- External Audiences
 - Scholars and researchers
 - Other archivists
 - Information professionals
- Internal Stakeholders
 - Staff
 - Administration

RESOURCE ASSESSMENT: PERSONNEL

How can we maximize the assets on our teams?

- Existing skills
 - Hard won experience
 - Emerging interests
- Capacity to learn and lead
- Collaboration

RESOURCE ASSESSMENT: INFRASTRUCTURE

- Physical Space
 - Individual workspaces
 - Collaborative areas
 - Whiteboards
- Hardware access
 - IT staff and support
 - Cloud storage
 - Digitization station

RESOURCE ASSESSMENT: PARTNERS

- Collaborators
 - Full partners who contribute to through the life cycle of the project
 - Continuous consultation and ongoing work
- Advisers
 - Trusted and experienced members of the field
- Subcontractors (work for hire)
- Community resources (outreach & support)

PILOTING AND ESTIMATING

- Survey of the full scope of the work
- Selection of a portion for processing
- Rough out a workflow/architecture
- Run the pilot and gather data
- Extrapolating to the whole
 - Account for increasing efficiency overtime
 - Anticipate particularly difficult areas
 - Pad for safety

FOG PRINCIPLE OF ESTIMATING

Is the information I have been given

- a fact (we have done this before it took X)?
- an opinion (we did Y, which is similar and that took us X)?
- or a guess (never done it before, but salesman thinks we can do it in X)?

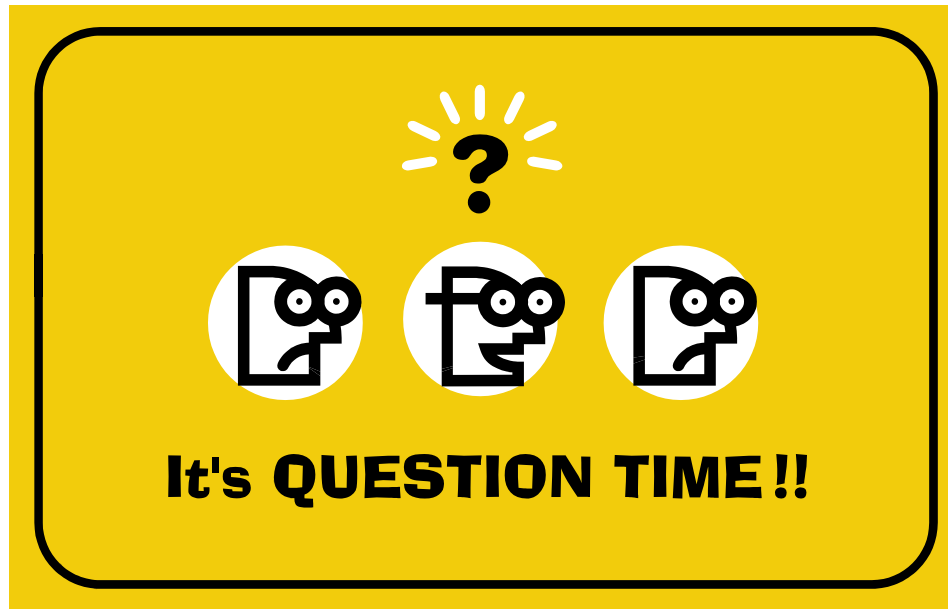
Multiply facts by 1.5, double opinions, and triple guesses.

PROJECT CHARTER

- Abstract
- Details of funder and period of performance
- Statement of needs, deliverables, outcomes
- Staff: key roles and responsibilities
- High-level Schedule

This should feel like a binding agreement for the project team. The document should not be longer than 3 pages.

QUESTIONS AND COMMENTS



2018 COSA-NAGARA-SAA JOINT ANNUAL MEETING, WASHINGTON, DC

- **Tuesday, August 14**
 - Archives on the Hill
- **Wednesday, August 15**
 - Great Idea Exchange Day and Work Session
 - Business Meeting and Awards Dinner (off-site)
- **Thursday, August 16**
 - Plenary Session, including Awards Ceremony I
 - Silent Auction
- **Friday, August 17**
 - Plenary Session, including Awards Ceremony II

UPCOMING WEBINARS

Member Webinar Series

July 26: *Project Management, Part 2*

August 23: *Annual Meeting Wrap-Up*

September 27: *SHRAB Town Hall*

October 25: *Mentoring Future Leaders*

UPCOMING WEBINARS

NARA-CoSA Joint Webinars

Quarterly series begins July 19

Crowdsourcing Archival Projects:

NARA History Hub

Alabama WWI Service Records

UPCOMING WEBINARS

Shop Talk Webinars

(From our \$10,000+ corporate sponsors)

Fall 2018

Last Fall: FamilySearch

September 13: Ancestry

October 16: Preservica

November 15: APPX

2018 SPONSORS & FUNDERS: THANK YOU!



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<http://www.statearchivists.org>

CoSA Resource Center

<https://www.statearchivists.org/resource-center/resource-library/>

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