



Project Management for Digitization Projects

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Agenda

- Managing the Process: Planning, Execution and Evaluation
 - A few words about project management
- Planning
 - Standards, Identifying Resources, Budgets
- Execution: High Level Workflow - Turning Plans into Action
 - Workflow, quality control
 - Working with Others: Where the plan meets reality
- Evaluation: Measuring Success



Managing the Process: Planning, Execution and Evaluation



Project Management

- Managing the Process: Planning, Execution, and Evaluation
- Vision
- YOUR responsibility
- Set an example
- Goalie



Planning

- Establishing vision/mission, goals and objectives
- Selecting appropriate standards
- Identifying necessary resources
- Creating comprehensive budgets

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Defining Purpose(s)

- What is your purpose: preservation, access, prestige, etc?
- Who is your audience?
 - 4th graders
 - Researchers
 - Genealogists
 - Students
 - Who are others?
- Everyone needs to be on the same page

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Defining Purpose(s)

- Mission/Vision Statements
 - Should embody the vision and values of project
 - Should be broad yet succinct
 - Provides a reference point or touchstone
 - Involve stakeholders

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British Library

- Through digitisation, we are creating a valuable and enduring resource for scholars and the public alike...



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Broward County Library

- The Digital Program's mission is to preserve and digitize special collections in order to further the library's mission. Digitization will:
 - Improve and facilitate access to relevant Broward County Special Collections and help preserve the original items by creating digital copies
 - Foster community-building by educating the public about Broward County history and the culture of South Florida
 - Provide collaborative opportunities for work with other local, regional, state and national digital collections
 - Recognize the 21st century needs of local, national, and international scholars, students and the general public by providing appropriate and current technologies for the delivery of special collections materials



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Ohio Memory

The mission of Ohio Memory is to provide access to historical treasures of Ohio, bringing together primary sources from all parts of the state in an online scrapbook that:

- commemorates the Buckeye State's bicentennial
- celebrates state and local history
- encourages cooperation between archives, historical societies, libraries, museums, and other cultural organizations
- allows the global community to discover and explore Ohio's rich past

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British Library Vision

- Our Ten Year Vision:
We aim to help researchers advance knowledge by becoming a leading player in digitisation. We will produce a critical mass of digitised content, reflecting the breadth and depth of our collection. We will provide a compelling user experience that facilitates innovative methods of research and meets 21st century requirements for interacting with content



<http://www.bl.uk/aboutus/stratpolprog/dig/digitisation/digitstrategy/index.html>

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Library of Congress - National Digital Library

We envision the National Digital Library as a set of distributed repositories of managed content and a set of interfaces (some of which will resemble traditional catalogs) to that content. Some interfaces may offer comprehensive access to the entire resource, while others will be specialized by content, by intended audience, or by primary purpose. Some interfaces will be closely tied to a particular repository, while others will provide access to a selection of content from distributed repositories

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Auraria Vision statement

- The Auraria Library Digital Program will create, collect, preserve, and supply far-reaching access to the full range of digital resources that support U.S. Western scholarship in particular and Auraria campus needs overall



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Establishing Goals

- Setting realistic, measurable goals
- Beware of project creep
- All involved should participate in setting
- SMART Goals :
 - Specific
 - Measurable
 - Achievable
 - Realistic and
 - Timebound

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Saint Joseph Hospital Archives Goals

- To be recognized as the resource for the history of Saint Joseph Hospital
- Increase awareness of the significant historical role played by Saint Joseph Hospital and the Sisters of Charity of Leavenworth in Denver, Colorado
- To staff the digitization program to appropriately support the ongoing digitization of materials.
- To provide a single user interface for searching and browsing collections based on the IT environment the Hospital, and the intended use of the Archives digital collections.
- To establish institution-wide standards and best practices that will assure creation of and the acquisition of high quality digital content

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Indiana University Digital Library Program Goals

- ...increase the number and range of digital resources available for faculty and students;
- ...offer digital library services and supporting technologies that are sustainable, scaleable, compatible ...and interoperable ...
- ...promote and support the scholarly use of digital content
- ...discover and promote currently available digital technologies
- ...address key research questions
- ...program of research
- ...establish a... reputation for developing a premier digital library
- ...collaborate with colleagues

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Ohio Memory Goals

- Increase access to hidden treasures
- Wide spread participation
 - all 88 counties
 - libraries, archives, museums, & historical societies represented
- Variety of media types
 - audiovisual, historical objects, natural history specimen, published, unpublished
- Coverage of topics
 - 20 subject categories

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Selecting Appropriate

STANDARDS

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Importance of Standards

- Why are standards important?
- Need to adhere standards
 - Interoperability
 - Best Practice
 - Funding
 - Migration

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Standards

- Metadata
- Capture for images, text, audio
- Copyright
- Internal: selection, quality control, etc.

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Identifying Necessary Resources

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Creating Comprehensive Budgets

- Frequently funding from grants
 - Budgets need to be prepared for proposal
 - You actually have to adhere to it, so get involved!
- You know more than you think
- When preparing a budget:
 - Scanning less than 1/4 project
 - Metadata and quality control vastly underestimated
 - Do sample and add on
 - Consider all elements of project and costs
 - What are they?

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Estimating Costs

- What are you digitizing
 - Books, manuscripts, photographs (both sides?)
- Compute cost and time of each step
 - What are the steps
 - Factor in extra
- Direct and indirect costs
- Outsourcing
 - Actual cost of outsourcing
 - Transportation of materials
 - Staff supervision

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RLG Worksheet

- <http://www.oclc.org/programs/ourwork/past/digimgtools/RLGWorksheet.pdf>

RLG WORKSHEET FOR ESTIMATING DIGITAL REFORMATTING COSTS

This worksheet is a guide for the preparation of a budget for activities involving digitization. It can be used for individual scanning projects or for those involving an outside vendor. The activities are organized in seven steps:

1. Select materials
2. Prepare the text of the collection
3. Prepare the metadata
4. Determine imaging requirements (hardware/software)
5. Determine requirements for staff and other resources
6. Determine imaging costs
7. Determine metadata costs
8. Determine printing and distribution costs
9. Determine additional staff costs

This accompanying spreadsheet provides a methodology for determining scanning requirements based on an assessment of document attributes and current scanning workstations. Excludes Office Scanway of Document Express.

1. SELECT MATERIALS

This step of the process includes:

- Identifying rights (copyright, privacy rights, donor rights, etc.)
- Determining the availability of digital and other software (such as document capture, OCR, etc.)
- Determining issues due to condition or completeness
- Determining appropriate preservation practices (e.g., file format, digital originals, etc.)

Estimate staff time required for selection, then the cost based on the cost of staff performing each process.

Number of hours: _____ Staff cost: _____ Staff rate: _____ \$/hr

Number of hours: _____ Staff cost: _____ Staff rate: _____ \$/hr

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Remember

- Things **will** happen
 - Estimates typically overly optimistic
 - Equipment will malfunction
 - Weather
 - Staffing:
 - illness, someone quits

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Execution: High Level Workflow: Turning Plans into Action



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What is Work flow?/Digitization Chain

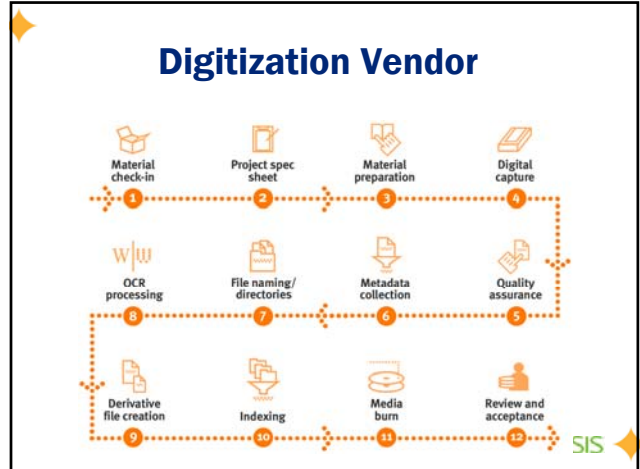
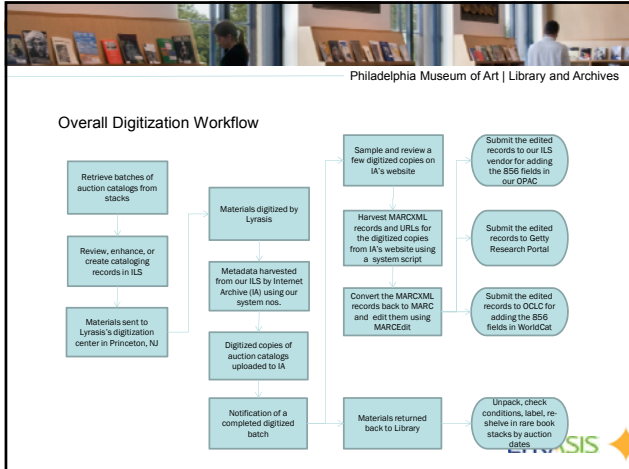
- Define:
- Why is it important to determine early on?
- Examples
 - Library of Congress – large scale program
 - <http://memory.loc.gov/ammem/techdocs/prjplan.html>
 - <http://memory.loc.gov/ammem/award/lessons/workflow.html>
 - University of Utah - newspapers
 - http://digitalnewspapers.org/public/pdf/project_handbook_4.pdf
 - Philadelphia Museum of Art
 - Ohio Memory – collaborative
 - Scanning center

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Creating a Workflow - Draft One

- Similar to creating physical collection
- Circular process - not linear!
- Who does what in what order
- Estimating time for each
- Scheduling work
- Stuff happens!
- Do a sample
- Be prepared to revise

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Quality Control

- Consider intent:
 - Faithful representation/Digital surrogate?
 - Best image possible?
- Codify specifics
 - What is done, when?
 - Who checks?
 - Knowledgeable or fresh?
 - Double, triple check?
- How will feedback occur?
 - Who will check the updates?
 - *Always* takes **far** more time than expected

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Working with Others: When the Plan Meets Reality

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Care and Feeding of Collaborative Relationships

- Challenges of Cooperation
 - Unclear goals, expectations
 - Physical separation?
 - Different backgrounds
 - Focus
 - Vocabulary
 - Purpose
 - Some more technically sophisticated

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Keys to Collaboration

- Everyone needs to understand what is happening and see progress
- For it to succeed, it must have clear, significant value to all involved
- Define Tasks, Roles, Needs, Expectations
 - Be as clear as possible
 - Deadlines
 - all involved in creating
 - not real
 - remind of deadlines, follow-up

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Evaluation: Measuring Success



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Project Outcomes Assessment Techniques

“How did you change behavior, organizations, lives?
What difference did you make?”

- Surveys
 - Written surveys
 - Telephone surveys
 - Email surveys (home-done or corporate)
- Case study or interview
- Focus groups (formal, structured discussions)

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Evaluation - Measuring Success

- Evaluate attainment of goals and objectives
- Evaluate use of site – statistics, etc.
- Not difficult if your originals were SMART:
 - Specific
 - Measurable
 - Achievable
 - Realistic and
 - Timebound

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Wrap Up

- Remember mission drives your project
- Standards make your project last
- Quality control is vital
- Workflow will be revised
- Evaluation – what did you accomplish?

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Final Thoughts

- Do a sample
- Decisions depend on circumstance
- The only ones who don't make mistakes are those who don't do anything!

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Questions?

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