

## Planning for digital projects

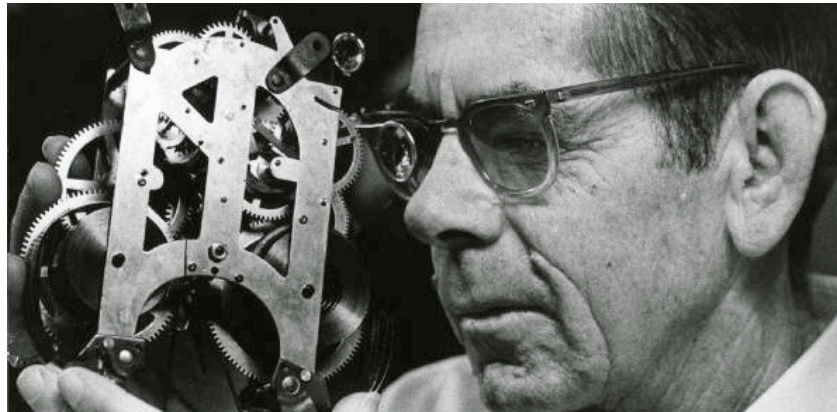


Kerri Willette  
The School of the Art Institute of Chicago

*CARLI Digital Collections User Group Forum*  
*You are not alone: Digital Projects in Illinois*  
*Chicago State University*  
*Friday, July 25, 2008*

## Overview

- Gear up for digital projects
- Take stock of your resources
- Form your team
- Develop a communication strategy
- Implement, document, and evaluate
- Additional resources

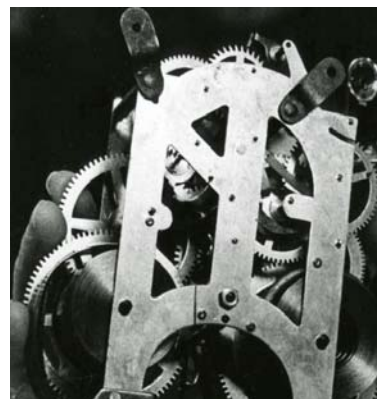


## Gear up

Defining a clear vision and specific goals for your project

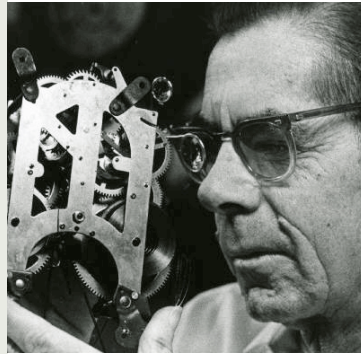
## Vision and goals

- Include all stakeholders in the initial planning phases
- Create a vision statement based on:
  - Institutional mission
  - User needs
  - Funder interests
- Define specific project goals



## Identify stakeholders

- Project staff
- Administration
- Technology support
- Funders, donors, etc.
- Others ???

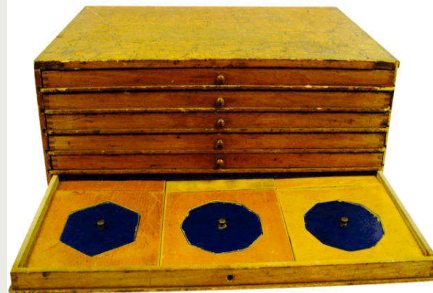


## Take stock of your resources

Know what you have so you know what you need

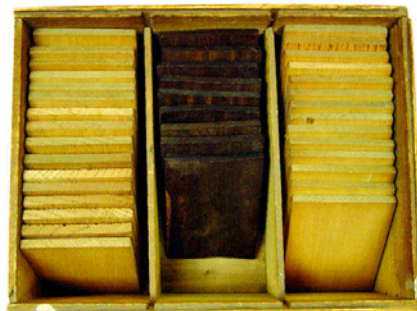
## Start with what you know

- Your collection
- Your technology
- Your politics
- Your audience



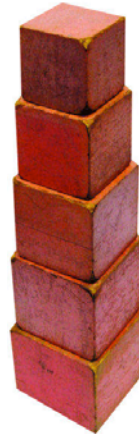
## Inventory your resources

- Physical space
- Personnel
- Technology
  - hardware
  - software
  - support
- Budget



## Inventory your collection

- Type, size, shape & condition of collection objects
- Current audience & potential users
- Rights & permissions



## Don't reinvent the wheel

- Digital project planning tools
- Metadata best practices
- Digitization guidelines
- Copyright statements
- Project management software
- Other CARLI libraries





## Form your team

Identify team members and their roles

## The project manager

- Responsible for the overall success of the project
- Proactively communicates project information to all stakeholders
- Identifying, tracking and resolving project issues
- Primary function varies depending on the experience and expertise of any given team



## Team roles



- Identify the range of expertise in your group – cataloging, rights management, graphic design, etc.
- Establish smaller working groups to deal with specific aspects of implementation – metadata task force, marketing team, web design committee, etc.
- All team members report back to the project manager

## Team process



- Establish an overall project timeline
- Plan meetings and assign tasks with due dates
- Be flexible and willing to revise as you go
- Develop a clear communication plan



## Communication

Tips and techniques for managing communication

## Team communication




- Establish a team mechanism for updating & sharing project info
- Schedule regular review meetings
- Produce meeting-by-meeting documentation

## External communication

|  |  |
|--|--|
| <h3>Identify target audiences</h3> <ul style="list-style-type: none"><li>Faculty &amp; student groups</li><li>Library staff</li><li>Administrators</li><li>Funders</li><li>Potential new user groups</li></ul> | <h3>Define outreach methods</h3> <ul style="list-style-type: none"><li>Training sessions</li><li>Mailings</li><li>Website announcements</li><li>Publications &amp; presentations</li><li>Web based promotion</li></ul> |
|--|--|

## External communication



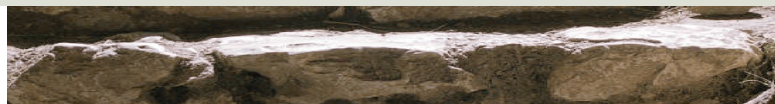
### Web based promotion

- Allow search engines to crawl your site
- Create a Wikipedia entry
- Ask partners and related collections to link to your site
- Enable OAI harvesting




## Implement, document, & evaluate

Navigating some final steps to success




## Steps to implementation

- Metadata creation
- Digitization
- Software licensing & support
- Interface design
- Training for staff and users



## Documentation

- Create local standards documentation and guidelines that can be applied to multiple projects
- Borrow shamelessly from others
- Document project specific workflow procedures as you go and update regularly
- Share!!



## Documentation

- CARLI Public Wiki:  
<http://wiki.carli.illinois.edu/index.php/Portal:CONTENTdm>
- CARLI Digital Collections documentation:  
<http://www.carli.illinois.edu/mem-prod/contentdm/cdm-sysdocs.html>

## Evaluation



- Usability testing
- Collect usage data and statistics from your server
- Review your project goals – Where did you succeed? Where did you fall short?
- Learn from your successes
- Learn from your mistakes

## Additional Resources

- CARLI Digitization Resources List:  
<http://www.carli.illinois.edu/mem-prod/contentdm/digresource08.pdf>
- BCR (Bibliographical Center for Research) – Collaborative Digitization Program, Digital Toolbox:  
<http://www.bcr.org/cdp/digitaltb/index.html>
- Echo: Guidelines for Digitization, Chpt 1:  
<http://www.ncecho.org:8090/Guide/planning.htm>
- Visual Resources Association: Online Resources and Software list:  
<http://www.vraweb.org/resources/diag/digreslist.html>

## Additional Resources

- CARLI Digital Collections User Group:  
<http://www.carli.illinois.edu/comms/dcug.html>
- CARLI Digital Collection Interest Group List:  
<http://carli.illinois.edu/mailman/listinfo/carlidc-ig>
- The person sitting next to you (jot their number down)