Instructors:

<table>
<thead>
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Abstract: This course will explore the fundamentals of project planning and design including, but not limited to: formulating appropriate disciplinary questions for digital humanities research, investigating digital humanities tools and resources, structuring your first project, critical path scheduling, understanding roles and responsibilities, risk management, documenting your project work, writing your first grant proposal, budget setting and controls, building the project team, and selecting and implementing project management tools and software. This is an advanced course and, as such, you are expected to have an understanding of the definition of digital humanities. Materials will be covered through lectures, discussions, presentations, and hands-on activities. Participants will get the most of the course if they arrive with at least some sense of a potential digital humanities project that they would like to develop throughout the course.

Learning Outcome: By the close of this workshop, we anticipate that participants will have a better grasp on the fundamentals of developing a project idea from inception to fruition with specific insights into how to fund, manage, and deploy a research idea.

Monday, August 4, 2014

Session 1: 9:30-10:45 Class Session
9:30-9:50 Introductions
9:50-10:45 Project Development: the Overview Study
11-Noon Best practice principles of designing your first project (the four elements of a good DH project; how do you know your idea is a good idea)

Reading: The Craft of Research, Part III, 3.0-4.4 (pgs. 40-71)

Session 2: 1:00-2:30 pm Working Session
1:00-1:45 Statements of Innovation and Humanities Significance: Writing your first abstract
1:45-2:30 Working Session Four Elements Outline
Session 3: 2:45-4 pm Working Session
Your First Statement of Innovation
Your Statement of Humanities Significance

Tuesday, August 5, 2014
Session 4: 9:30 am- Noon Class Session
9:30-10:15 Building your Project Team and Recruiting Partners
(How do you identify what team members you need? How do you solicit partners? What types of stakes do partners have? How do you manage expectations?)
10:15-10:45 Concrete Products
(What constitutes the products of a project? How do you judge the scale of your products?)
10:45-noon Working Session
Partners and Project Teams
Concrete Products

Session 5: 1:00- 2:45 pm Class Session
1:15-1:45 Technologies for Digital Humanities
(intro to basecamp, google docs, etc)
1:45-2:45 Wrangling your data (Trevor: Data Curation for Project Development)
(Introduction to data management; Github; and versioning; principles of accessibility, transferability, and hosting)

Session 6: 3-5 pm
3-3:45 Project Development with Students
3:45-5 Working Session
Tech to Manage
Wrangling Data

Wednesday, August 6, 2014
Session 7: 9:30-Noon Class Session
9-10:30 Principles of Workplan development
(what’s a workplan? how does it work? what do you do when it doesn’t?)
10:45-noon Working Session
Building your first Workplan

Session 8: 1:00-2:15 pm Class Session
1:00-2:15 Principles of budget design
Homework: Building your First Budget
Thursday, August 7, 2014
Session 9: 9:30-Noon Class Session
  9:30-10:15 Charters, agreements, and handshake deals
  10:15-11 Branding, Marketing and Publicizing your Project
  11-Noon Working Session
       Branding and Publicizing your Project

Session 10: 1:00-2:45 Class Session
  1:00-1:45 Evaluating your project and team members
  2-2:45 Project Documentation & Disseminating Results
       (project documentation, white papers, final reports, articles, blogs, and
       publicity)

Session 11: 3-5 pm Discussion
       3-5 All about problems
       (when projects or members go awry? who’s in charge? what happens
       when you fail?)

Friday, August 8, 2014
Session 12: 9:00-Noon Class Session
  9:00-10:00 Finding Funding
  10:45-Noon Your First Grant

Session 13: 1-2:30 Class Wrap Up
       1-1:30 Next Steps
Humanities Intensive Learning and Teaching
Project Development

Introductions

Your Instructors:

@jenguiliano

@jsappleford
Your Course Site:
http://www.devdh.org/courses/hilt2014/

Our Hashtag:
#HILT2014 #DevDH

Our Twitter:
@DevDH

Your Classmates

Introduce yourself

Introduce your potential project

What questions do you want answered?
Project Development: The Overview Study

Digging into Image Data to Answer Authorship Related Questions

Type of Project: Algorithmic Development

Five Parts of the Project:

Scholarly provocation: Can computational image analysis algorithms be used across differing visual arts collections with a high degree of accuracy?
Five Parts of the Project:

Scholarly Question: Can computational image analysis algorithms be used across differing visual arts collections with a high degree of accuracy?

Provocation: No studies of image analyses targeting the problem of authorship have been applied to very large collections of images and evaluated in terms of accuracy over diverse datasets.

Project Collaboration Sites

- University of Sheffield, UK
- Humanities Research Institute
- Department of French, School of Modern Languages and Linguistics
- University of Illinois at Urbana-Champaign, USA
- National Center for Supercomputing Applications
- Institute for Computing in Humanities, Arts, and Social Science (I-CHASS)
- Department of French
- Department of English
- Art History, School of Art and Design
- Michigan State University, USA
- MATRIX: Center for Humane Arts, Letters, and Social Sciences
- Department of Computer Science and Engineering
- MSU Museum and Department of Art and Art History
- Alliance of American Quilts, North Carolina, USA

Project Team Members

Peter Ainsworth (HS)
Michael Meredith (CS)
Simon Appleford (DH)
Peter Bajcsy (CS)
Steve Cohen (HS)
Kevin Franklin (DH)
Karen Fresco (HS)
Jennifer Guilliano (DH)
Wayne Dyksen (CS)
Matt Geimer (CS)
Anne D. Hedeman (HS)
Anil Jain (CS)
Rob Kooper (CS)
Mark Kornbluh (DH)
Bob Markley (HS)
Tenzing Shaw (CS)
Amy Mline (HS)
Michael Simeone (HS/DH)
Dean Rehberger (HS/DH)
Justine Richardson (HS/DH)
Collaboration Mechanism:

- listserv
- ooVoo (skype)
- email
- subversion (version control/cs)

Five Parts of the Project:

Sources:

15th-century Froissart manuscripts
17th- and 18th-century maps
19th- and 20th-century quilts

Analytical Activities

Historical Maps
- Selection of source objects in maps (ancient, the five Great Lakes)
- Segmentation of these objects from maps
- Classification of land use
- Shape comparison metrics (currently and)

Five Parts of the Project:
Five Parts of the Project:

Analytical Activities

Quilts

Analytical Activities

Medieval Manuscripts

Analytical Activities

Manuscript Illuminations

- Segmentation approach: Template shape-based registration using 7 key landmarks.
- Small: Minimize the distance between mask and example shape in space of all moments or a set of parameters.
- Parameters: size, location, and threshold.
Five Parts of the Project:

Audience

Subject Scholars
- Art Historians
- Cartographers
- Quilt Scholars

Methodological Researchers
- Public
- Image Analysis
- Authorship
- Authenticity

Five Parts of the Project:

Products
- Digging into Image Data Grant (DID1)
- Memorandum of Understanding
- 3 websites (UIUC, MSU, Sheffield)
- 3 repositories (Froissart, Quilt Index, Medici)
- 4 algorithms
- 4 papers
- 4 conference posters
- 7 conference presentation
- 4 presentations
- Digging into Image Data Grant (DID2)
- 90+ hours of video conference footage
- listserv logs
- email chains
Best Practice
Principles of Your First Project
(or what you should do)

Developing research ideas is more about communication than creativity

Five Parts of a Research Project

- a question, problem, or provocation
- sources (primary or secondary)
- an analytical activity
- an audience
- concrete products
What Is a Project?

- sequence of related activities
- derived from a question, issue, or problem
- requires the development of resources
- requires an audience and/or other participants
- results in a product

What Is a Project?

- event
- meeting
- workshop
- conference
- symposium
- research
- analysis
- investigation
- experiment
- development
- telling a story, writing an argument,
- answering a question, developing a theory

Question

What is the role of Richmond, VA in the American Civil War?
Problem

George Alfred Townsend (1865) and Kenneth Noe (1997): “Richmond ... remains an offstage presence, a sort of metropolitan version of Hamlet's father, mentioned with frequency but rarely seen.”

Provocation

"Mining the Dispatch," seeks to explore—and encourage exploration of—the dramatic and often traumatic changes as well as the sometimes surprising continuities in the social and political life of Civil War Richmond.

Creating and/or Refining your Question

who? to describe
what? to contribute
when? to develop
where? for what purpose?
why? to explore
how?
Sources and Materials

- scarcity and abundance
- primary and secondary
- feasibility
- quality and complexity

Serving Many Masters

"the roots of the concepts [of interdisciplinarity] lie in a number of ideas that resonate through modern discourse—
the ideas of a unified science, general knowledge, synthesis and the integration of knowledge."


So How Do You Know It is a Good Idea?

- It has an audience of more than YOU
- It challenges disciplinary assumptions
- It innovates a new method or approach
- It clearly elucidates its own value
- It improves on previous efforts
What’s a Bad Idea?
Thinking that only your opinion or work on the project matters.

Starting a project without considering your commitment to it.

Looking at someone else’s project and attempting to duplicate it wholesale.

Not having a clear measure of what is considered project success.
Statements of Innovation and Significance

Significance

Explain - in terms comprehensible to a general audience - the significance of your proposed project

Significance

How does your project:

contribute to a particular discipline or field?

contribute to the humanities more generally?

What is the impact of your research?
Significance Checks:
- the "first time" (unless it really is and you can prove it)
- innovative, exciting, NEW (unless you can prove it is)
- a duplication of something someone has already done (just with new material)

Evaluation Criteria
The intellectual significance of the project for the humanities, including its potential to enhance research, teaching, and learning in the humanities.

Example
"Our workshop will provide humanities scholars with a deeper understanding of the vocabulary of LDA topic modeling (and other latent variable modeling methods) and best practices for interpreting the output of such analysis, and will articulate fundamental literary and historical questions for researchers outside of the humanities who are developing the models and methods (as well as the software implementations)."
What it Should have Been:

"Topic Modeling is a type of statistical analysis that allows you to discover concentrations of concepts that occur in a collection of documents. With topic modeling, we can discover potential themes and ideas in massive collections of materials to better understand what people wrote about in a given period or type of material. Our workshop will provide humanities scholars the opportunity to discuss and explore the models, methods, and software implementations of topic modeling."

Innovation

creates something new
offering an interesting new approach to tackling a problem

technical innovation
makes use of an existing technology in a new way
it is the project collaboration that is innovative
address a longstanding humanities issue in a new way

Innovation

“True innovation is rare, and reasonable people can disagree as to what constitutes innovation. You therefore need to make a strong case for the innovative character of the proposed project.”
Example

"In traditional crowdsourced transcription applications, a user might spend ten minutes correcting an article, and the product of that labor would be a correct transcription of the article. In our application, the user could identify dozens or hundreds of difficult characters that appear in the articles from that same time period, and the system would use this new knowledge to improve OCR across the entire corpus. By focusing on the human engagement with the algorithm (rather than the text itself) and experimenting with various methods for incentivizing community engagement and dedication, we will potentially create new mechanisms to improve OCR."

Objectives

What specific objectives or deliverables will this project offer?

- e.g. amount of data used, number of pages created, quantity of pilots attempted

Itemize your objectives

Example

"The objective of this project is to learn what is unique about the style of individual artists, and to provide results at a much higher level of confidence than previously has been feasible. As such, we will:

- design image analysis algorithms that will extract salient image features, group images based on similarity of these features, classify groups according to a priori knowledge, and optimize algorithmic steps and parameters;

- apply the developed algorithms to the three collections of images; report accuracy and computational requirements over all of the image collections."


Building your Project Team

How do you know you are ready for a team?

As an Individual

You’ve reached the limits of what you can do on your own
technically
infrastructurally
intellectually
(needing collaborators)
Common Staffing:

Staffing Your Project:
Administration

Project Director:
Intellectual and Strategic Leadership

Associate or Assistant Director:
Development and Outreach

Staffing Your Project:
Technical Staff

Lead Programmer:
Technical Vision and Day-to-Day Supervision

Programmers:
Hackers/Coders/Builders

Systems Administrator:
Hardware, Software, and Systems Config;
Security and Access
Staffing Your Project:
Visual Outreach

Graphic Designer:
Logos, Brochures, Mailings, Websites

Website Designer:
CMS Installs, Custom Sites, Center Site

Staffing Your Project:
Project Management

Project Manager:
The Details Person
Handles all the Logistics/Meeting Planning and Tracking of Deliverables

Staffing Your Project:
Financial/Business Staff

Business Manager:
The financial nuts and bolts, personnel, grants admin, etc
Staffing Your Project: 
Education and Outreach

Education Specialist: 
Curriculum Designer 
Trainers

Project Team Principles

Types of staffing:
Dedicated/Permanent (100%)
Joint or Multi-Part (>100%)
The type of staffing you choose will affect your project’s capacity and its obligations

Project Team Principles

The more part time staff on the project, the more coordination that is required

The “split” attention problem
The Back Up

No one project staff member can do everything.
Understand each others’ roles and abilities

Where do Team Members Come From:

Your department (colleagues, IT staff, admin)
Your college (IT staff, contracts/grants)
the Campus IT (sys admins, programmers, data stores)
the Library (subject specialists, librarians, programmers)

They Don’t:
	have to come from your campus
	have to be academics
	have to be in your particular field or discipline
How do you get them to say Yes:

- Do they already provide this service/work? (paid or unpaid)
- Have they said they want to do this type of thing? (strategic plans)
- What do they need for promotion? What does their boss care about? (the self-interest principle)
- Do you know them already? (the friendship discount)

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Recruiting Partners

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Content Contributors

- Individual Scholars
- Museums
- Libraries
Expertise Contributors

Non-Digital Researchers
Subject Librarians
Technical Partners

Resource Contributors

IT Support: Hardware, Software, Sys Admin
Host Partners: Physical Space
Network Partners: Access to Audience

For Every Partner You Should:

identify what they will contribute
have a clear statement of the value of the project to the partner
determine their pattern of engagement
Types of Partnership

- one-time partners
- quarterly or monthly partners
- daily/embedded partners

the value and density of contribution = project authority

I'm not loving this slide anymore. I think we could do one that is more about campus outreach and external partners.
Concrete Products

If your research wouldn’t change anything, why are you doing it?

Each project transforms the questions and opens up new sources

Your idea for research might be the product of an earlier one

Failure is a product

Types of Product

| blog post | apps |
| press releases | books |
| code | article |
| websites | (peer-reviewed v non-peer) |
| tweets/social media | presentations |
| lessons/guides | |
Tracking your Products
frequency (re-tweets/re-posts)
location (distribution network)
citations
engagement (comments, visits)

googLe.com/analytics

Tools for Tracking your Products
Twitter Archiving Google Spreadsheet TAGS v5
Mailchimp.com (for announcements)
http://www.google.com/analytics/ (websites)
Hootsuite (social media)

Quick Tips:
Keep a running excel document
(contribute quarterly if not monthly)
provide a copy of your reports to stakeholders (annual and ending)
make it someone’s job
to track the products
Reporting Your Products
  team members
  stakeholders
  administrators
  funders
  your boss/chair/dean/president
Technologies to Manage Your Project

Text Files
- Use machine readable file names
  MITH_TopicModeling_Narrative
- Use standardized names for types of materials
  bios.doc      narrative.doc      budget.doc    cv.doc
  data.doc      budget_justification.doc
- Keep individual files and aggregate files
- Use versioning and dates
  narrative.v1.2.doc

Evaluate your Needs
- What do you want to do?
- How much time do you want to spend doing it?
- What is my budget? (Open Source or Commercial)
- Who will be the primary user?
- Has someone else done this before?
- Does our campus have an existing solution or resource?
- Do I have to build from scratch?
### Google Groups

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### Basecamp

![Basecamp screenshot]

- Project Management
- Task Tracking
- Files and Documents
- Discussions and Forums
Project Development with Students

Students:

- Are Not "Free" Labor
- Are Not There to do "Scut" work
- Should have clearly defined roles and assignments
- Should be collaborators

Assessment:

- What skills do you already have?
- What might we learn together in the time that we have?
- Remember most students are with you for 15 weeks at a time (fall, spring, summer)
- What do you want out of this project?
Assessment:

Is it going to take longer to teach the students than it
would if you either did it yourself or hired a professional?

Is the quality of work you need going to
be met by the students?

Are you willing/able to manage student issues?
Most common: non-standard work hours, limited notice
for vacation, exams, personal issues

Common Valuations of Students:

Students doing Coursework: $Free
Undergraduates: $8
Master’s Students: $12
Ph.D. Students: $15
New Professionals: $25
Intermediate Professionals: $36
Advanced Professionals: $54+

Intellectual Property

Any work completed in the classroom is the student’s
intellectual property.

You need students’ permission to distribute their work
beyond the classroom.

FERPA states that identifiable information about a student
cannot be released to any third party without their
consent.
So What Does this Mean?
For you to use their work, student’s must waive their rights to be identified by:
- name
- email
- grade level
- and even status of enrollment in class.

Even contributions that are “anonymous” must have a waiver if they are going to be retained. You assign a number to each anonymous contribution and that number is their signature.

This includes:
- notes
- papers
- blogs
- tweets
- pictures
- audio
- video
- portfolios
- transcriptions
- artistic work
- websites

Typical Waiver:
I, _____ (full name), hereby waive my rights to be identified by name as a student at ___(enter institution) enrolled in the course _____ (course title). I hereby grant to _____ (instructor) the rights to disclose and publicly identify my participation in this course.

the identification clause
Typical Waiver:

I, _____ (full name), hereby grant to _______ (instructor) an exclusive license for the full period of copyright throughout the world: to publish any draft or completed course assignments that may be part of the project; to distribute those assignments, either within the project, or as separate related materials, in printed, electronic, or any format/medium whether now known or hereafter devised; to revise, update, or distribute course work to the public; to authorize or grant license to third parties to do any of the above; and to maintain or deposit copies of course assignments to the current project or to any other party as authorized by the instructor.

Considerations:

Creative Commons or other licensing rules:
e.g. must the student work always include student citation ad infinitum forever.

What happens if a project disbands or dies? (e.g. do you destroy student work after the project ends?)

Importantly:

This does not pertain to students who work for hire. Their materials are considered work product and are governed by your institution’s intellectual property rules.

Most institutions enforce ownership of all copyright and licensing for student-employees and staff. Thus, before you start your project, you need to consult with your University Legal Office on an Intellectual Property waiver.
But wait, what if I change institutions:

You should keep a copy of all Intellectual Property Waivers as well a copy of the University policy and the results of any conversation with Legal.

If you move institutions, you should file these with your new institution.
Building Your First Work Plan

A Work Plan

List of itemized tasks
List of individual responsibilities
Includes a time element
Includes a deliverables/outcome element

Step One:

List every major objective

then

Add the individual steps that must be completed

Your first time, everything you do is a task
Step Two:

For every task ... List who is responsible:
List by team
List by person

Step Three:

For every task ... List the deliverable:
How do you know a task is completed?
Where does completed work go?

Step Four:

For every task ... List the amount of time required from start to finish
Common Time Measurements

a day
a week
a month
by quarter
by year

the best measurement depends on the total project duration

Budgeting your Time

A short-term project:

A 40 hour week
5% = 2 hours
10% = 4 hours
20% = 8 hours
etc.

Budgeting your Time

A year-long project:

40 hours per week x 50 weeks = 2000 hours
5% = 100 hours total (2 1/2 wk)
10% = 200 hours (5 weeks)
20% = 800 hours (20 weeks)
e tc.
Time ??

What if I don’t know how long something should take?

How many dependents does it have?

How complex is it?

How many staff know about it?

Is it something that has been done before somewhere else?

Ways to Build a Work Plan

Simple Word Document
Excel Spreadsheet
Tree Chart
Network Logic Chart
Gantt Chart

Ways to Improve Your Work Plan

Color code types of work
Create modules
Identify dependancies

Decision-Making: By color coding types of work you can assign supervisory responsibility
Work Plan in Practice

All Project Responsibility: PM, PI, and Director
Administrative Tasks: Project Manager
Technical Tasks: Lead Programmer
Website Tasks: Web Developer
Content Tasks: PI
Financial Tasks: Business Manager

Work Plan Changes

You can’t control everything
You can’t control external factors
You can’t control personalities

Scope Change

Requirement of project change
Design element change
Technology change
Change in mission/business
Change in skills
Baseline Change

- Project specifications
- Financial cost changes
- Resource changes
- Partner changes
- Changes in discipline/field

When is Change Needed?
- When your team isn’t working well together
- When you aren’t meeting deliverables
- When you have new, or a change in, partners
- When resources disappear
- When funders or stakeholders request change
- When your PI isn’t doing their job

When is Change Allowed?
- When it doesn’t cost you:
  - additional money
  - additional time
  - additional deliverables

    UNLESS
By Making the Change:
  You deliver a better product
  You can increase the impact
  You are better positioned for the
  next phase of the project

HOWEVER

Scope Creep
  When new partners come to the project
  When PIs get excited
  When projects get press
  When your staff changes

Regular Scope Assessments
  Does our current scope
  accomplish our primary goals?
  Are the core stakeholders pleased?
  Is the project team enjoying its work?
When a Project Becomes Painful

Identify the quickest route to completion
Remove all extraneous meetings/work
Be upfront about what isn’t working in the work plan

Changing Project Scope

All team meeting to discuss changes and potential effects

Memorandum of change:
Update project work plan
Update project responsibilities
Notification of stakeholders

Common Errors in Work Plans

Too broad
Too specific (changes constantly)
Principles of Budget Design

Getting Started

- Plan ahead
- Always refer back to your work plan
- Determine maximum available dollars
- Always double-check solicitation for specific requirements or limitations
- Use a template if possible
- Don’t forget about indirect costs
- Don’t be afraid to ask for help!

Salaries

- Base calculations on actual salary figures
  You can’t give yourself a pay raise!
- Do include an annual 3% cost of living increase for multi-year projects
- Make sure you put people in the correct salary categories
  Don’t forget to include benefits
Faculty Salaries
Typically in Form of Summer Salary
Sometimes you can include course buyouts
NSF and other agencies limit total amount of faculty time on all grants to no more than two summer months
Ask for your money back first!

Staff Salaries
Non-faculty collaborators
Types of role might include:
- Project Management
- Programmers
- Sys Admin
You can’t include salary for proposal development
Don’t underestimate salary needs

Students
Research Assistants or Hourly Students?
Depends on type of work being asked of them
Research assistants good for projects that require sustained engagement or intellectual role
Hourly students useful for specific, short-term action items, such as website maintenance
Research assistants typically must include some form of tuition remission (either percentage of salary or flat rate)
### Other Direct Costs: Equipment
- Only include large single-item equipment needs (over $5,000)
- Equipment can only be used for work specifically described in your proposal
- Include vendor quotes in your justification or as supporting materials

### Other Direct Costs: Travel
- Can be used to meet with collaborators at other universities
- Okay to travel to conferences so long as it is connected to your project
- Differentiate between domestic and foreign travel

### Other Direct Costs: Participant Support Costs
- Rules determined by funder
- Can be applied to:
  - Travel and accommodation costs for non-project staff (i.e. Workshop Attendees)
  - Catering
  - Room Rental
- You do not have to pay indirects!
### Other Direct Costs

- Materials and Supplies
- Miscellaneous Expenses
- Printing Agendas, Name Tags, etc.
- Publication Costs
- Publishing Fees for Project-Related Articles

### Other Direct Costs

- Other
- Server Hosting Fees
- Small Equipment Purchases (including computers)
  - Can only be used for project
- Catering/Room Rental if Participant Support category is not allowed
- Consultant Fees or Honoraria
- Anything Else!

### Subcontracts

For multi-institution collaborations
One institution is designated the lead and manages all money
Partners submit separate budgets, which are approved by their grants office before submission
Indirects are typically charged on first $25,000
International rules
Indirects

- Your institution wants their cut!
- Pays for administrative overheads
- Federally negotiated rate
- Typically calculated as 50-60% of your direct costs
- Is not charged on participant costs
  or large equipment purchases
- Not all solicitations allow charging of indirects
- Different rates for different activities
- You can request a waiver from VPR
Charters, Agreements, and Handshakes

Lord, save me from my partners, colleagues, and boss

Put It In Writing!

The more partners in the project, the more you need to memorialize any agreements.

It isn’t that people are mean or malicious, it is just that we are all busy.

Often, we forget our agreements and thus end up not delivering on them.
If it is in writing, you can’t ignore it
If it is in writing, others can’t avoid it
If it is in writing, there is “hypothetically” an even playing field for everyone

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Charters

Statement of shared values
Statement of goals
Type of products

---

Rules

documentation
citations/attributions
publishing and credit
communication
roles and responsibilities
appropriate behaviors
Line Items

licensing
credits
partnerships
preservation
access to products

Agreements

access to resources
access to staff
duration of access

while agreements can contain the same information as a charter, an agreement does not necessarily have to be signed by all parties within a project.

Agreements

the most common type of agreements are:

limited term access to a resource
"hidden" partnership agreements

project manager to staff member agreements
(i.e. if you do x then we’ll give you time to do y)
Pros

Charters and Agreements can:
aid you in getting the entire team on the same page
create useful opportunities for dialogue
can allow your team clear grievance processes
places the onus on the entire team to comply rather than one individual

Cons

Charters and Agreements:
Don’t address issues of inequality and status directly
Often get used once the project begins, but what works isn’t what was agreed to
Have to be continually updated with changes

Frequent Collaborator Discount

Trust is irreplaceable
Once trust is in place, repeat projects together
Collaborators can earn leeway
Handshake Agreements

- Be wary of untested partners who aren’t amenable to formal agreements (even if only in email)
- Be sure when the project relies on a handshake that if that handshake deal fails, the project can recover
- Know when to use a handshake to avoid bureaucracy
Branding and Marketing Your Project

Pre-Planning

Project Names
- Should be Easily Distinguishable
- Can be Abbreviated or have an acronym
- Should be identifiable to your audience

always run a google search and a scholar search on any project name
Example Brand

High Performance Sound Technologies for Access and Scholarship (HiPSTAS)

first institute: “a side”
second institute: “b side”
Project Websites

while the URL for a project may be unique, think carefully about how many sites you are prepared to manage.

Who is going to maintain the project? Will you always have time, money, or support to update it?

Wordpress Multisite as a maintenance solution

Project Social Media

Where does your audience talk online? (twitter, facebook, instagram, flickr, etc.)

Is this the only project you ever intend to do or will you build off of it?

Twitter

hashtags #keyword
no more than 6 characters
account: @
no more than 10 characters
every character used is one less in the message
Twitter
Follow your stakeholders
Follow your partners
Where possible, tweet regularly and with time between tweets
Pre-schedule your tweeting! (Tweetdeck to manage multiple accounts)

Harvesting
collect all tweets on your project from the 1st day

TAGS 5.0.1:
http://mashe.hawksey.info/2013/02/twitter-archive-tagsv5/

Facebook
Consider your community before opening an account
Are you willing to post/maintain/friend regularly?
Link your twitter account to Facebook to auto-publish
If your project exists in a physical space, can you make it a destination for contributors?

Press Releases

Award of Funding
Documenting Your Progress
When New Partners Join
When You Publish/Present
Release of Products

Press Release Components

Project Title and Abstract
Message/Update
@ for funders
@ for partners
Website Link
Quote from Pertinent Person
Press Release Audience

Project Staff
Campus Stakeholders
- college, library, research office, press office
External Partners
Funders
News Outlets

Press Release Audience

Meet regularly with university press officers

What stories can be told about your project?
When people know what you are doing, they can help advertise your work

Primetime

You are ready to discuss your work publicly:
• As soon as you start (project generation)
• In progress (issues you are dealing with, partner seeking)
• Midterm (initial results)
• Final Products (successes and failures)
Timing is Everything

Coincide your major project deliverables with:
• deadlines for conferences
• funding deadlines
• start of academic year
Evaluating Your Project and Team

Evaluation Opportunities

Weekly (tracked via completion of to-do items)
Monthly (informal discussion/interview)
Quarterly (formal meeting with team member and PI)
Annually (written evaluation by each team member)
At Project Completion (written report by PM)

Common Evaluation Issues

Team member not completing tasks efficiently or on time:

What is impeding the team member?
Knowledge?
Time?
Personal issues?

What can you change to correct these issues?
When to replace a team member?
Delays in Resources

Regular reminders
Formal letters of request
Phone calls from PIs or major stakeholders
Create drop-dead delivery deadlines

At identification of issue, begin creating alternative scenarios for resource support

Written Evaluations

Provide a record of an individual’s progress on the project:

What am I doing?
What do I wish I was doing?
What am I unwilling to do?
How much time?

What is your most frustrating thing about this project?

Large Scale Team Evaluations

By each team PM (my team functioned...)
By each team member (I did my job...)
By each team PI (this worked, this didn’t)
By you (recommendations for change/stasis)
Handling Problems

A beer or coffee can smooth a lot of issues

On all teams, personal issues often trump professional issues

Make sure every team member has an opportunity to offer criticism (anonymous or otherwise)

External Evaluations

Select a comparable project or team (scale, deliverables, etc) and ask them to spend the day with your team.

What are they seeing? What do they suggest?

Outside mediators can often see things without distraction
Project Documentation & Disseminating Results

Documentation

- Copies of all files (text, data, image, software, etc)
- Versions for public distribution (financial data redacted)
- Versions for all partners (pdf packages)
- Digitize notes, agendas, etc. (store by title, date)
- Regular blog posts and reports (crawl and archive)

What’s a Project Report?

- An accounting of all project activities
- Quarterly/annually/interim/final
- Sent to project partners, administrators, funding agency
- Posted publicly
Common Requirements

- Workplan versus actual accomplishments
- Changes in: methodology, pedagogy, products, staff
- Financial spending report
- Products (status and links to)
- Statements of use (audience, uptake, etc)
- Evaluation of project (by team and external groups)
- Long term impact (as measured by initial grant)
- Next steps

What's a White Paper?

- Abstracted from the project report
- Includes lessons learned
- Best practice statements
- General audience rather than stakeholders

Why Write the White Paper?

- It is perfect for a peer-reviewed article submission
- It is a statement of use for the community
- It suggests new areas of work
Where to Disseminate Results?

- Peer-Reviewed Journals
- Major Conferences (DH, MLA, AHA, ARL, etc)
- Online via Project Websites
- University Publicity
- University Office of Research
- Major Media Outlets (if appropriate)
- Chronicle of Higher Education
- InsideHigherEd
- DHNow
All About the Problems

When Projects Attack

Delays (avoidable or otherwise):
- set hard deadlines
- decide what you HAVE to have to move forward
- use your power(s)

Not enough money:
- Be upfront about what you can do
- Which deliverables will have the most impact?
  - those are your primary goals
- Don’t delay in identifying how to save money
When Team Members Are Unsuccessful

Is it a personality thing?
A knowledge thing?

Play to people’s strength

Never assume you understand
what is going on with someone else

Offer training
Offer an opportunity to discuss
Draw a firm line in the sand

When PIs are the Problem

“I am so ... (busy, important, overworked)”

be clear that time is money
that everyone is valuable

that without their support,
the project can’t move forward

that you can’t reconfigure
everything because they have an issue

You Can:

Document deliverables (or their lack of)
Document your attempts to meet/discuss
Write a formal letter of request

Do nothing
Do “the slow play” move (delay, delay, delay)
Cut off access to staff and resources
When YOU are the Problem:
  Allow team members or PI to suggest changes
  Be clear that you no longer are useful to the project
  Discuss clearly your problems/issues and offer solutions
  Decide whether you still believe in the project and then act accordingly
  Don’t let it fester

Realize that Projects are like children, they need discipline, guidance, enjoyment, trust/faith, and a clear goal.

Your job is to make sure the Project stays alive

OR

to be merciful and end the Project’s suffering before it causes a tidal wave of issues.
Grant Funding

A Grant Is:

a statement of intent
couched as a sales pitch
that contains a plan of action
that demonstrates expertise and experience
AND offers a return on investment

A Grant Is:

a risk in that it is public
an opportunity to test your team’s
understanding of its project and priorities
a contractual obligation
Identifying Grant Funding
National Endowment for the Humanities:

- Division of Education (22%)
- Division of Preservation and Access (33%)
- Division of Public Programs (11%)
- Division of Research Programs (16%)
- Office of Digital Humanities (23%)
Identifying Grant Funding
Institute of Museum and Library Services
$219 million
dedicated to libraries and museums
concentrated in 4 divisions: library services, museum services, african american history and culture, general research

Identifying Grant Funding
National Science Foundation
$6.9 Billion (v. $132 million NEH)
Directorate for Computer and Information Science and Engineering (CISE)
Information and Intelligent Systems
Human-Computer Interaction
Information Integration and Informatics
Collaborative Research
Cyberlearning

Identifying Grant Funding
National Institutes of Health
$30.1 Billion
National Library of Medicine
Local First

State Humanities Councils (~$2,000-$5,000 per award)

Internal grants via Research Office and your Department

Foundations

The Mellon Foundation
The Sloan Foundation
The Gates Foundation
The Ford Foundation

Knowing Your Funder

Identify previous awardees
Create relationships with program officers
Attend their events
Understand their grant process
What Comes Next?

When a Project Ends:
- Give thank you notes to valuable members
- Give public statements of value of team members/partners
- Wrap up everything cleanly and provide copies to stakeholders, funders, archives etc.

When a Project Trails Off:
- Formalize your documentation
- Bag all products
- Create a succession memo should the project restart (with new staff)
When a Project Fails:

- Admit failure
- Celebrate that you attempted the project
- Acknowledge your stakeholders
- Discuss trying again

The Final Project Development Principles

You never know what your project can be unless you invest time, effort, and intellectual work in it.
You should always plan your project like it is a house, the better the foundation the more likely it will survive long term.

You should play to your strengths. Know what you care about and what you are good at.

Project Development is a game of both inches and miles. Know whether you are running a sprint or a marathon.
Writing Your Grant

Getting Started:
Carefully review solicitation and guidelines
Make sure that you are eligible to apply
Make sure that your project is relevant to the program
Don’t be afraid to contact the program officer if you have any questions

Commonly Required Parts
- Narrative/Explanatory
- Literature/Background
- Description/Justification
- Budget
- Budget Justification
- Bibliography
- Work Management Plan
- Letters of Commitment
- Educational Articles
University Coordinator

Meet your coordinator before your first grant

How many days to process a grant?
Is there someone who can help you write budgets?
Who needs to sign off on a grant?
Ask for a link/copy of all university policies
What is the university Indirect/F&A rate? 39%

University Processes

Single Institution Grant
Draft Documents (budget, justification, draft narrative):
10 working days prior to external deadline

Final Documents:
5 working days prior to the external deadline

University Processes

Grants with Subcontracts
Subcontract Documents (sub budget and justification):
14 working days prior to external deadline

Draft Documents (budget, justification, signed subcontract documents):
10 working days prior to external deadline

Final Documents:
5 working days prior to the external deadline
Reviewers

Familiar with the call for submissions
Usually receive a checklist of requirements
Grants are broken into pools by topic/theme and assigned to review pools
Reviewers offer initial assessment
Assessment Meeting
Provide recommendation to Funding Agency Officers
That recommendation goes to Executive Body for award
Always

Check your final grant submission against:
- The rules of the competition for:
  - page length, funding amount, PI status
- University rules for:
  - tuition and fees, amount of salary allowed

Keep a copy of all grants

Ask for comments from reviewers

Understand

Grant processes have human variables

Grants will take as much time as you allow

People will wait until the last minute

The reviewers’ comments can change with each review

Little things matter:

Proofread your application carefully

Notify your grants office of submission well in advance

The internet is not your friend.

The Secret to Winning

Have a Compelling Humanities Question

Don’t make it more difficult than it needs to be

Have a History of Success (start small)

Be realistic

Persistence
What Comes Next?

When a Project Ends:
- Give thank you notes to valuable members
- Give public statements of value of team members/partners
- Wrap up everything cleanly and provide copies to stakeholders, funders, archives etc.

When a Project Trails Off:
- Formulate your documentation
- Bag all products
- Create a succession memo should the project restart (with new staff)
When a Project Fails:
Admit failure
Celebrate that you attempted the project
Acknowledge your stakeholders
Discuss trying again

The Final Project
Development Principles

You never know what your project can be unless you invest time, effort, and intellectual work in it.
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