Humanities Intensive Learning & Teaching

Project Development
August 4-8, 2014

Instructors:

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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

@sjappleford

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)

Steve Cohen (HS)
Wayne Dyksen (CS)
Matt Geimer (CS)
Anil Jain (CS)
Mark Kornbluh (DH)
Marsha McDowell (HS)
Amy Milne (HS)
Dean Rehberger (HS/DH)
Justine Richardson (HS/DH)

Simon Appleford (DH)
Peter Bajcsy (CS)
Kevin Frankin (DH)
Karen Fresco (HS)
Jennifer Guiliano (DH)
Anne D. Hedeman (HS)
Rob Kooper (CS)
Bob Markley (HS)
Tenzing Shaw (CS)
Michael Simeone (HS/DH)

Collaboration Mechanism:

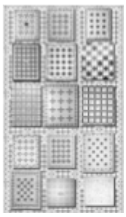
listserv
oovoo (skype)
email
subversion (version control/cs)

Five Parts of the Project:

Sources:

15th-century Froissart manuscripts

17th- and 18th-century maps



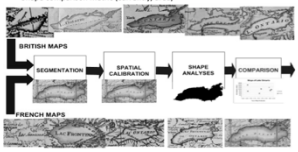
19th- and 20th-century quilts

Five Parts of the Project:

Analytical Activities

Historical Maps

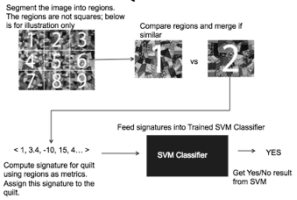
- Selection of common objects in maps (currently, the five Great Lakes)
- Segmentation of these objects from map images
- Calibration to identify scale
- Shape comparison metric (currently, area)



Five Parts of the Project:

Analytical Activities

Quilts



Five Parts of the Project:

Analytical Activities

Medieval Manuscripts

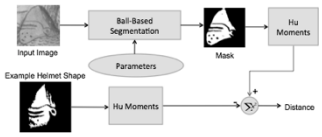
Apply shape recognition algorithms to polygonal models to identify similar letters, words, symbols and patterns

Five Parts of the Project:

Analytical Activities

Manuscript Illuminations

- **Segmentation approach:** Template shape-based segmentation using 7 Hu Moments
- **Goal:** Minimize the distance between mask and example shape in space of Hu Moments over a set of parameters
- **Parameters:** seed-location, ball size, and threshold



Five Parts of the Project:

Audience

Subject Scholars

Art Historians
Cartographers
Quilt Scholars

Public

Archives
Museums
Libraries

Methodological Researchers

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
3 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	research
meeting	analysis
workshop	investigation
conference	experiment
symposium	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?
what?
when?
where?
why?
how?

to describe
to contribute
to develop
to explore

for what purpose?

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."

- Julie Klein, Interdisciplinarity: History, Theory, and Practice. Detroit: Wayne State University, 1990.

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

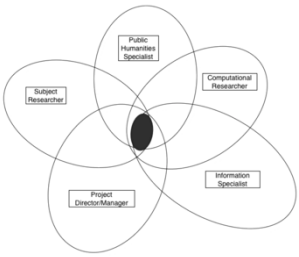
You' ve reached the limits of what you
can do on your own

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

Educational 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 effect 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)

Recruiting Partners

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

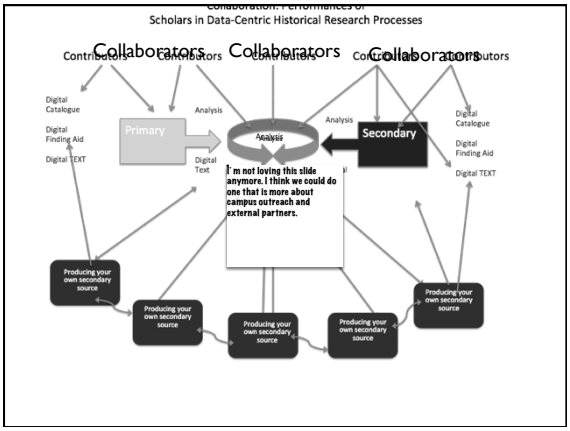
Types of Partnership

one-time partners

quarterly or monthly partners

daily/embedded partners

the value and density of contribution = project authority



Concrete Products

Concrete Products

Each project transforms the questions
and opens up new sources

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

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

Failure is a product

Types of Product

blog post

press releases

code

websites

tweets/social media

lessons/guides

apps

books

article
(peer-reviewed v non-peer)

presentations

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)

http://scholar.google.com/intl/en-US/scholar/citations.html (scholar citations)

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

adminstrators

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
data.doc budget_justification.doc cv.doc

Keep individual files and aggregate files

Use versioning and dates

narrative.v1.2.doc

Evaluate your Needs

What do you want to do?

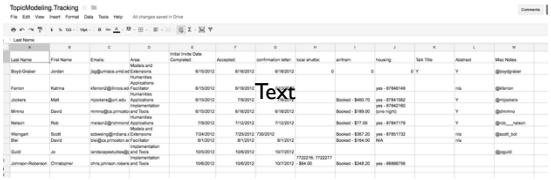
How much time do you want to spend doing it?

What is my budget? (Open Source or Commercial)

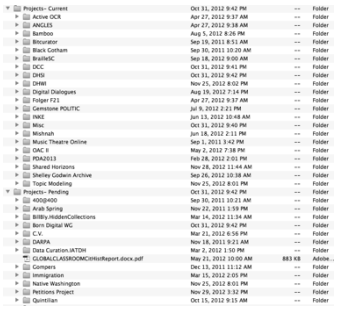
Who will be the primary user?

Has someone else done this before?
Does our campus have an existing solution or resource?
Do I have to build from scratch?

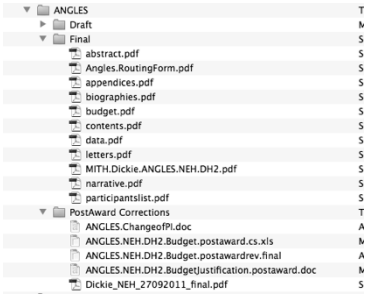
Tracking



Use Standardized File Names

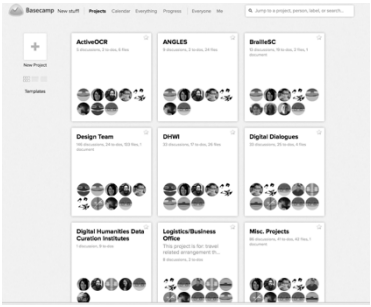


Use Standard Organization



Google Groups

Basecamp



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)
etc.

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 you aren't meeting deliverables
When your team isn't working well together
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 web site 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

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

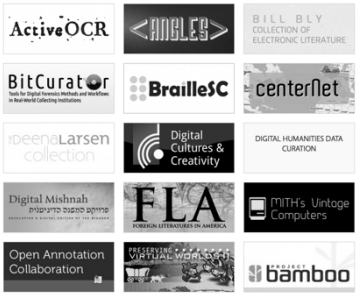
always run a google search and a scholar search on any project name

Example Brand

High Performance Sound Technologies for Access and Scholarship (HiPSTAS)

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

HIGH PERFORMANCE
HiPSTAS SOUND TECHNOLOGIES
FOR ACCESS AND SCHOLARSHIP



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 maintence 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

4Square

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:

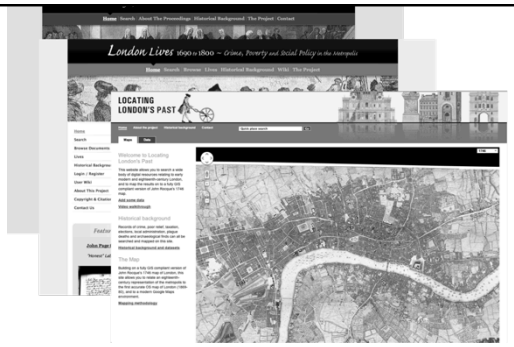
a statement of intent
couched as a sales pitch
that contains a plan of action
that demonstrates expertise and experience
AND offers a return on investment

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



Accessibility

liblouis
A Braille translation and back-translation library

WordPress

moodle
open source software for collaborative learning

AccessibleFuture.org

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
- square hole round peg
- Don't be afraid to contact the program officer if you have any questions

Commonly Required Parts

- List of Participants
- Humanities Statements
- Technology Innovations
- Environmental Scan
- History and Duration
- Workplan
- Dissemination/Publicity Plans
- Budget
- Budget Justification
- Bibliography
- Data Management Plan
- Letters of Commitment
- Educational Materials

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

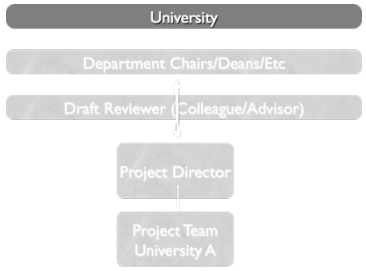
Final Documents:
5 working days prior to the external deadline

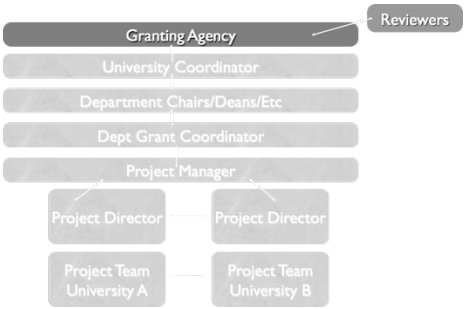
University Processes

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?

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