

**Train to Share: Interoperability Training for Cultural Heritage
Institutions
Laura Bush 21st Century Librarian Program Grant**

Award # RE-06-08-0084

Texas State Library and Archives Commission

Interim Report #2

March 1, 2009 – August 31, 2009

Project Director: Beverley Shirley, Director Library Resource Sharing

512-463-5433

bshirley@tsl.state.tx.us

Project Purpose:

In the three-year Train to Share (TtoS) project, the grant partners will address the need, identified nationally but equally evident at the local level, for quality sharable metadata, metadata produced within specific traditions of practice that can nonetheless be shared seamlessly across communities to provide a rich experience for digital library users. Anticipated outcomes for TtoS include:

- Significant increases in knowledge by and among participating metadata specialists, as measured by improved metadata quality and consistency.
- Improved access to the rare and unique materials held by cultural heritage institutions, as measured by the number and type of objects available from project participants at the end of the project.
- New and sustainable partnerships vital to the ongoing development of digital projects across the state.

In order to accomplish the desired project outcomes, TtoS is divided into three phases. Each phase is associated with a set of project objectives and activities against which to measure our progress.

- I. In the first phase, outreach and observation, separate communities of practice from libraries, archives, museum, government agencies, and other cultural heritage institutions will be identified.
- II. In the second phase, education, project trainers will adapt the Library of Congress' "Cataloging for the 21st Century" workshop series to incorporate the needs and traditions of the separate communities of practice. Participant teams will be trained using the adapted workshop series.
- III. In the final phase, production and evaluation, our participant teams will put what they have learned into practice through the development of ten digital products, fully described using an appropriate metadata schema that can be crosswalked to allow interoperability.

Project Activities and Accomplishments, Report Period 2:

Activities in overall support of the grant:

Danielle Plumer, THDI Coordinator and project director, and Karen Frizzell, THDI Outreach Coordinator have taken advantage of several opportunities to increase their expertise in matters pertaining to the grant. These include:

- Grants Management Class – The purpose of this course was to provide attendants with the skills to be better stewards of their grant funds, including information on how to develop a solid framework for meeting grant program requirements and mitigating administrative
- 2009 WebWise: The theme of the 2009 WebWise was *Digital Debates*, providing a discussion of the issues faced by museums, libraries, archives, and other cultural institutions in terms of emerging technologies and providing background for identifying both the potential roadblocks to the success of TtoS and the solutions that could enable us and our partners to overcome roadblocks.

- American Library Association (ALA) Midwinter Meeting: Programs such as “Breaking Down the Silos – Planning Discovery in Library 2.0,” “Managing Technology,” and “Top Technology Trends” provided insights into ways to enhance discovery and accessibility of the digital objects created by the TtoS project participants using current and emerging technologies. Meetings with colleagues and vendors brought these discussions to a practical level - reviewing tools available and in development, discussing management of digitization initiatives, and sharing successful training programs and techniques.
- Texas State Historical Association Conference: In addition to the educational opportunities provided by conference programming, face-to-face conversations offered a great way to introduce our project to people from across the state. Ms. Frizzell took advantage of this conference opportunity to meet persons who could utilize or benefit from an online state history resource for use in instruction or for scholarly research.
- Texas Association of Museums (TAM) Annual Conference: Dr. Plumer attended, in part to continue discussions with the University of Texas at El Paso and El Paso area institutions concerning the need for training courses in the region. These discussions led to the formation of one of the project teams, that on the Mexican Revolution.
- Society of Southwest Archivists (SSA): Ms. Frizzell met with and learned from people in other states who are working on digital archival projects. She was able to discuss the merits of the “Train to Share” project with a target audience, resulting in one of our project applications, “William Sydney Porter and Austin: From Surprising Beginnings to the O. Henry Ending.”
- Joint Conference on Digital Libraries: Dr. Plumer attended in order to review the newest academic literature on imaging techniques and use of digital libraries for education.
- Society of American Archivists Conference: Both Ms. Frizzell and Dr. Plumer attended the conference, held in Austin, and took advantage of pre-conference workshops to improve their skills. Information from the conference, including material on visual literacy, specifications for imaging projects, archival management systems, and developments to the EAD and EAC standards, will be incorporated into appropriate courses in the training series.
- Ms. Frizzell attended two online Amigos workshops, “Project Management for Digital Imaging” and “Metadata for Digitized Resources.” These and other courses sponsored by Amigos were, before the Train to Share grant, the primary courses on digital imaging and metadata available in the state outside of credit courses in the University of North Texas (UNT) and University of Texas – Austin (UT) graduate-level information programs. The courses provided Ms Frizzell with an opportunity to evaluate the current level of instruction available on these topics and to evaluate the existing course materials for potential inclusion in the Train to Share series.

To support the development of Train to Share course materials, and looking ahead to the development of online courses to be offered in years two and three of the project, the Texas State Library and Archives Commission (TSLAC) has subscribed to Moodle through RemoteLearner.net. All course materials will be made available to registered students and guests at <https://traintoshare.tsl.state.tx.us> as they are developed; new materials will be added on an ongoing basis as appropriate.

Phase I Benchmarks:

- A. Participating collaborative projects identified and contracts with ten institutions representing collaborative projects executed. *Completed.* Ten collaborative projects in geographically diverse locations in Texas have been identified and contracts for participation executed. Each collaborative includes one library, one museum, and one institution of another type (archives, government agency, corporation, society, etc.) The ten collaborative projects that are part of the Train to Share initiative are outlined below:

Name of Project	Description of Project	Lead Institution/ Type*	Partner Institutions/ Types*	Location
"Texas Artists: Paintings, Sculpture, and Works on Paper"	This team has developed a partnership to create the proposed "Texas Artists: Paintings, Sculpture, and Works on Paper" digital project ("Texas Artists"). This initiative will provide access to images of paintings, sculptures, works on paper and materials related to Texas regional artists that are held by the three Dallas institutions.	Southern Methodist University's Central University Libraries (L)	<ul style="list-style-type: none"> • Dallas Museum (Art/M) • Dallas Public Library Texas/Dallas History & Archives Division. & Fine Arts Division (A, L) 	Dallas
Currently Untitled – materials related to Mexican Revolution	This cooperative digitization project will digitize and make available primary resources relating to the Mexican Revolution, pointing to the one-hundredth anniversary of the beginning of that struggle, which is coming up in 2010. Many of the items this team proposes to digitize are extremely fragile such as books, pamphlets, historic photographs, postcards, and special editions of El Paso newspapers published during the Battle of Juarez in May of 1911.	University of Texas at El Paso Special Collections Library (L)	<ul style="list-style-type: none"> • El Paso Public Library, (L) • El Paso Historical Society (A) 	El Paso
"Mexican American War	The Mexican War in the Brownsville region is the focus of this team's work with a priority on	UT Brownsville and Texas	<ul style="list-style-type: none"> • Palo Alto 	Brownsville

and South Texas/Northern Mexico, 1846”	the preservation of documents housed at the Casamata Museum and Archives. Since these records were housed in Mexico, they were previously inaccessible to Americans. These records include U.S. Military documents focusing on the occupation of the city of Matamoras by the American Army, port records, correspondence, newspapers and historic artifacts. The historic battlefield will digitize a collection of rare books related to the Mexican War and a series of historic artifacts.	Southmost College Special Collections Library (L)	National Historic Battlefield Site (O, M, L) • Casamata Museum & Archives (M, A)	
“Literature, Photography, and Architecture of West Texas or the Artistic Heritage of West Texas” (title pending)	By combining their special collections for this digital project, this team proposes to paint a portrait of culture in West Texas. This project will focus on literary manuscripts held at TTU-digitizing materials from southwestern writers such as Sandra Scofield, Max Crawford, and Walt McDonald. Complementary material includes the photography of M.C. Ragsdale from San Angelo and Fort Concho, and architectural images from Fort Concho.	Texas Tech Library Southwest Collection/Special Collections Library (A, L)	• Angelo State University (L) • Fort Concho National Historic Landmark (M, A)	Lubbock
“Earth, Wind & Fire: Texas Energy Resources”	Petroleum and other natural resources will be the theme of this collaborative digitization effort. Items related to the state’s history of oil and wind power would be emphasized, including oral histories, photographs, documents, manuscript collections, hand-colored maps. Of particular importance will be an emphasis on solar dish and blueprint collections and numerous technical reports. Other energy-related collection items deal specifically with coal, wind, water, oil and gas. Includes material depicting the life in boomtowns and oil camps of the 1920s and 1930s.	Friends of THC Confederate Reunion Grounds State Historic Site (O, A)	• Texas Tech University Southwest Collection/Special Collections Library (L, A) • Permian Basin Petroleum Museum (M)	Mexia
“Are We There Yet? Travel and Transportation in Central Texas”	This project will result in a digital collection of historic photographs and two-dimensional items representing the history and development of transportation and the travel industry, including but not limited to: railroads, vehicles, roads and road construction in the Central Texas area.	Taylor Public Library (L)	• TxDOT Travel Information Division (O, A) • Williamson Museum (M)	Taylor
Currently Untitled- The Texas Panhandle	This online digital project will represent the Texas Panhandle region, drawing from the visual, documentary and three-dimensional objects in the collections of the project partners, they will bring alive the history and culture of this unique region of Texas.	Panhandle Plains Historical Museum (M)	• Amarillo Public Library (L) • West Texas A & M University (L)	Canyon
“The Houston	This collaborative project will digitize and	Rice University	• Museum of	Houston

Yacht Club Digital Archive Project"	provide access to selections of this team's archives, which focus on the port of Houston and the ship channel - yacht racing, prominent Houstonians, sailing, and material related to Houstonians during the Great Depression and WWII.	Special Collections Library (L, A)	Houston (M) • Houston Yacht Club (O)	
Currently Untitled – 12 th Armored Division	This project will provide a rich resource for the community and serve as a catalyst for the development and on-going cultivation of cultural institution partnerships in the West Texas region. The partnership will document the story of Camp Barkeley and the history of the 12 th Armored Division, focusing on the resources in Abilene Public Library's Camp Barkeley Scrapbook and the 12 th Armored Division Memorial Museum's newsletter, <u>Hellcat News</u> .	Abilene Library Consortium (L)	• 12 th Armored Division (O) • TBD	Abilene
"William Sydney Porter and Austin: From Surprising Beginnings to the O. Henry Ending"	The famous short-story writer, William Sydney Porter (1862-1910), better known by his pen name, O. Henry will be the subject of this digitization effort. This team will digitize a variety of materials related to the author's life including: maps, photos, ledgers, manuscripts, sketches, paintings, and other O. Henry ephemera.	General Land Office (O, A)	• Austin History Center (A, M) • Texas Capital Visitor Center (M, O)	Austin

*Types of Institution: A=archives, L=library, M=museum, O=other

Note: Each of the TtoS projects aims to:

- Provide metadata for least 1000 digital objects from identified collections.
- Investigate strategies to establish a synergistic link between the collections of partner institutions.
- Explore the integration and interoperability of metadata developed by multiple types of institutions.
- Develop appropriate project-specific guidelines and/or standards, with documented crosswalks or profiles to ensure interoperability.
- Learn more about each organization's holdings and skill sets, setting the groundwork for future possible joint projects
- Provide access to a unique digital collection that highlights an aspect of the culture, history and heritage of the State of Texas

Project participants are enthusiastic about this opportunity and see it as beneficial to their institutions and to the public they serve, as evidenced by their comments in their applications and reports. A selection of these follows:

The Train to Share digital project would be highly beneficial for all three institutions [GLO (General Land Office), Austin History Center, and the Texas Capital Visitors Center], with the GLO working for the first time on a major collaborative digital project with

local partners, exposing its high quality digital scanning lab to other local cultural resource institutions, and learning more about national metadata standards and shareable metadata. —Mark Lambert, Deputy Commissioner, General Land Office

The Train to Share training will provide Southern Methodist University, the Dallas Museum of Art, and the Dallas Public Library with countless benefits that can be applied within each organization. The collaborative nature of the project will allow staff members to learn more about each organization's holdings and skill sets, thus setting the groundwork for future possible joint projects. The Texas Artists collection will provide access to a unique digital collection of paintings, sculptures, and works of art, thus contributing to the study of art in general and Texas culture in particular.—Cindy Boeke, Digital Collections Developer, Southern Methodist University

As one of the last areas of Texas to be settled, the Texas Panhandle is still in the process of developing the cultural resources that document the heritage of the region. Likewise, institutions in this area are in the first stages of sharing their holdings through digital means and would welcome the benefits offered through participation in the Train to Share project of the Texas Heritage Digitization Initiative. —Warren Stricker, Research Center Director, Panhandle Plains Museum

- B. Metadata practices survey and crosswalk. In order to assess the range of metadata practices in existence across the state, Dr. Plulmer has been surveying existing digital collections with the goal of incorporating them into the Texas Heritage Online metasearch engine. While this survey is not yet complete, and crosswalks to normalize metadata from various sources have not yet been written, some troubling trends have emerged:
- Since our last survey of digital collections, conducted in 2006, several institutions have abandoned digital asset management systems previously in place, including one major research university that has made Flickr its primary means of public access to its collections and another that is using the Google Book project as its primary public access point. This suggests that there is an increasing perception that users do not value high-quality metadata, although the institutions in question do still maintain catalogs for internal use and, presumably, digital preservation, although this latter point has not been verified.
 - The number of institutions with CONTENTdm licenses has increased dramatically. CONTENTdm is particularly widely used in medium-sized academic libraries, although three large public libraries also have licenses. More than half of the institutions contacted are using OCLC's

hosting services, primarily because of lack of technical support within their institutions.

- The number of small and medium-sized museums using PastPerfect as an asset management system continues to increase. Dr. Plumer is currently working with several museums to improve our ability to work with collections described in PastPerfect that are not currently accessible to the public, as well as with museums that use the PastPerfect online module.
- A number of small and medium-sized public libraries are using open-source photo management software rather than digital asset management systems. Reasons given for selecting these systems range from available technical support, often from the city IT department, to the ability to incorporate content into an overall web content management system such as Drupal.

This survey is ongoing but should be completed by December 2009. We hope to publish the results of the survey in 2010.

C. Outreach efforts.

Considerable effort has been made presenting information on the Train to Share project both within the state and in national forums.

In-state presentations have fulfilled several purposes:

- Recruitment of collaborative project participants
- Recruitment of persons to attend project-sponsored workshops (in addition to those persons attending as part of a collaborative project)
- Recruitment of adjunct instructors for the classes
- Building awareness of the benefits of collaborative projects and sharable metadata

Out-of-State presentations have addressed the following needs:

- Building awareness of the benefits of collaborative projects and sharable metadata
- Sharing successful strategies for building collaborative projects
- Sharing successful strategies for making digital projects accessible
- Learning from persons who have had successful experiences building collaborative projects in other states
- Alerting colleagues that the workshop series we are developing will soon be available for use by persons who would like to use the training materials in their locations.

Outreach events during this reporting period include:

- Creation and distribution of flyer on the Train to Share Project (Appendix A)
- Presentations at professional conferences:

- o ALA Annual conference: Dr. Plumer presented at the Library Information and Technology Association (LITA) Digital Library Technologies Interest Group session and at the Association of Specialized and Cooperative Library Agencies (ASCLA) Collaborative Digitization Planners Interest Group. As a member of the LITA Education Committee, she also presented information about the course series to other committee members, introducing the possibility that one or more of the courses will be adopted as LITA Regional Institutions or online courses.
- o Texas Library Association (TLA) Annual Conference, Houston: “Train to Share: A Training Opportunity with the Texas Heritage Digitization Initiative,” presented by the project partners, promoted the project and outlined the application process for potential participants. Dr. Plumer assisted with the planning for the second annual Digitization Expo held as a pre-conference to TLA. Ms. Frizzell presented information about TtoS and the training opportunities we would be providing. The conference, especially programs such as the TSLAC-sponsored “Going Digital” also provided a venue for meeting with potential project participants and resulted in an application from the Houston partnership for “The Houston Yacht Club Digital Archive Project.”
- o Texas Conference on Digital Libraries: We presented “Train to Share: Statewide Interoperability Training from the Texas Heritage Digitization Initiative” at this conference, providing an opportunity to spotlight our project, its vision, and its goals to a number of persons interested in digital projects. Participation in this conference resulted in a project application for “Texas Artists: Paintings, Sculpture, and Works on Paper.”

Phase II Benchmarks:

- A. THDI (Texas Heritage Digitization Initiative) Pre-conference Workshops. The initial planning for the course series recommended that TtoS courses be offered in conjunction with TAM, TLA, and SSA conferences. This recommendation did not take into consideration the 10 – 12 month planning schedule for these conferences, and in any event the first training module was not completed in time for presentation at the conferences, which are held in the spring. We were not, therefore, able to schedule the pre-conference workshops as originally envisioned. We did, however, take advantage of these conferences to meet with library, museum, and archives professionals and to promote their participation in the project. Given the structure of the first completed round of workshops, we do not currently feel that offering them as pre-conference workshops in 2010

would provide any clear benefits. We will continue to focus on other outreach activities at these conferences.

B. Workshop Development.

The project plan called for the completion of these activities in support of workshop development during this reporting period:

- (1) Grant Oversight Committee meeting. Members of the Grant Oversight Committee, consisting of Daniell Plumer (TSLAC), Dreanna Belden (UNT), and Gina Minks (Amigos), met in Dallas on June 24 to review progress to date. Of particular concern were delays in finalizing contracts between TSLAC and UNT and TSLAC and Amigos concerning the project. Those contracts have now been executed.
- (2) Development of additional course materials.
 - At the February 2009 THDI annual meeting, Mark Phillips and Jeremy Moore from UNT presented a half-day workshop on digital imaging that was very well-received. The Grant Oversight Committee has agreed in principle to develop this as a face-to-face workshop to supplement other course materials, as students in the first course consistently requested information about digital imaging specifically.
 - Quinn Stewart from the UT Austin School of Information has agreed to let us refer students to online tutorials created as part of the school's digitization curriculum. Tutorials are listed at http://www.ischool.utexas.edu/technology/tutorials/graphics_tutorials.php and will be incorporated into the Train to Share workshops and course materials on Moodle as appropriate.
 - Additional tutorials on specific topics relevant to the workshops are being developed and loaded into the Moodle site. Currently, these include tutorials on online project management tools. A series on available digital asset management systems and other tutorials are planned.
- (3) Grant Advisory Board meeting. We were unable to schedule a meeting of the Grant Advisory Board this reporting period, but members of the board are preparing for a meeting this fall to complete the logic model and evaluation plan for the project.

C. Workshop offerings.

(1) *Digital Project Planning and Management Basics*

The project partners have successfully completed the first training module, "Digital Project Planning and Management Basics." The

course provides the basic knowledge and skills needed to plan, implement and assess a digital project, exploring the following topics: (See Appendix B for the course description)

- Project Planning: Environment Scans, Needs Analyses, and Goal Development
- Project Management: Defining Tasks and Resources, Scheduling, and Tracking
- Financial Issues: Budgeting, Fundraising, and Contracting for Services
- Legal Issues: Copyright and Permissions

The project plan had been to offer this two-day module in eight locations, training a total of 50 persons. We offered the workshop in six locations, reaching forty-seven participants. An additional 18 participants from Texas governmental agencies served as a test audience for the beta version of the class. Following the successful beta session in Austin, the two-day workshop was offered in Lubbock, Houston, Dallas, El Paso, Brownsville and Georgetown. (The last class took place in FY2010, Q1, but it is included here to keep outputs from all offerings of any given workshop together for reporting purposes.)

Workshop Name	Workshop Location	# of fully grant-funded participants	# of participants with grant-discounts	# of non-discounted participants	Average Satisfaction Rating (on a scale of 1 to 5)
Digital Project Planning & Management Basics	Austin	(Beta Version)	(Beta Version)	18 (not charged)	N/A*
Digital Project Planning & Management Basics	El Paso	3	2	4	4.75
Digital Project Planning & Management Basics	Lubbock	5	1	1	3.57
Digital Project Planning & Management Basics	Houston	3	0	5	4.125
Digital Project Planning & Management Basics	Dallas	4	0	2	4.5
Digital Project Planning & Management Basics	Brownsville	3	0	1	4.75
Digital Project Planning & Management Basics	Georgetown	12	0	1	4.59

*There are no written evaluations from the beta class, only our notes from the discussion that followed the class.

Evaluation of Training:

The evaluation tool used for this workshop (included in Appendix C), addressed students' knowledge before and after the course as well as their satisfaction with the course content and delivery. The results of workshop evaluations will be used for both formative (to improve future workshops) and summative (to evaluate the overall success of the workshops) purposes. Of the students who attended the first TtoS course, *Digital Project Planning and Management Basics*, the following results were found from the pre/post training questionnaire:

Element of training with which students rated their knowledge, familiarity or confidence	Pre-Training Competency (percent rating competency at 3 or better on a 5-point scale)	Post-Training Competency (percent rating competency at 3 or better on a 5-point scale)
Scope of a digital project	60.6%	100%
Elements of a project management plan for digital projects	60.6%	100%
Skills needed to develop a project budget and funding strategy	57.6%	100%
Legal issues that could jeopardize a digital project	63.7%	100%
Criteria for assessment and selection of tools to evaluate outcomes	48.5%	100%

We value the input of course attendees. Included below are some comments gathered from the course evaluations for *Digital Project Planning & Management Basics*. Reviewing feedback helps us determine if the course outcomes are being met, if a shift in perspective needs to be made, or if the curricular content and exercises need to be modified for future students. From these comments, it seems students have gained a level of confidence and competence in planning for digital projects and they plan to apply this knowledge to their TtoS project and/or share the information with the colleagues on their teams.

“We are in the planning stages for a digital project at our institution, so the content presented was very timely and relevant and will be used

almost immediately to improve and strengthen our plan and future applications.”

“We are considering some digitization projects and have never [done] so before, so everything here was helpful in knowing how to plan our projects.”

“I found the evaluation and assessment portion to be useful ... these can be easily implemented into current and future project planning.”

“The legal section of this was very good, and I will incorporate this when evaluating potential digitization projects.”

“I plan to share this information with other staff members and incorporate some of the tools and ideas into our documentation and grant-writing efforts.”

“I really liked Bill’s style of teaching. It is obvious he puts a great deal of time and preparation into the course. He makes the class interactive and I felt comfortable about contributing ideas and asking questions. Having Dreanna is wonderful! Her wealth of experience and ability to impart information and knowledge is a terrific asset. The class would not be the same without her!”

“I will refer back to handouts and discussions of copyright, planning, and outcome assessment.”

“I enjoyed the collaborative aspect that both Bill and Dreanna brought to this course along with their varied experiences. It was great to be able to discuss past projects they have worked on.”

“I am working on a Train to Share project and will use all phases of this workshop in developing a plan, a timeline, and an evaluation.”

“Things were broken down well enough that I feel more confident about completing my work and more qualified to face challenges.”

(2) *Digital Library Systems and Applications*

We originally scheduled the second training module, *Digital Library Systems and Applications*, to be offered in July and August, but we are slightly behind schedule and will now be offering this second module in October and November.

Train to Share Schedule: Digital Library Systems & Applications (Workshop 2)		
Sept. 8-9	Austin (beta)	Texas State and Local Records Center
Oct. 8-9	Brownsville	University of Texas Brownsville

Oct. 19-20	Lubbock	Texas Tech
Oct. 22-23	El Paso	University of Texas at El Paso
Oct. 28-29	Houston	Rice University
Nov. 9-10	Dallas	Amigos Library Services
Dec. 2-3	Georgetown	Georgetown Public Library

Anecdotal Information:

As reflected by an email we received that reads, “Thanks so much for allowing our team to be part of this project!!!” participants are very excited to get the training they need to create a successful digital project - especially when it comes to gaining more exposure for collection items that have not previously been made available to the public. This enthusiasm was further evidenced by a conversation occurring in Matamoros, Mexico between Karen Frizzell, and the Assistant Director of the Oliveira Library for the University of Texas—Brownsville & Southmost College. Ms. Frizzell learned that the Casamata Museum & Archive is hosting a Fulbright Scholar from the University of California—Berkeley this year. The scholar is utilizing material that will be digitized as part of the Train to Share project, “Mexican American War and South Texas/Northern Mexico, 1846.” Members of the project team in Brownsville are pleased that their project will enable future scholars to view this same material online.

Certification:

In submitting this report, I certify that all of the information is true and correct to the best of my knowledge.



March 27, 2009
 Beverley Shirley
 Director, Library Resource Sharing



Your Library. Your Passion. Your Amigos.

Home

- Amigos
- Continuing Education

Browse

- By Subject Categories
- All Face-to-Face
- All Live Online
- All Self-Paced
- All Courses
- New Workshops
- Updated Workshops

Search

- Course Catalog
- Scheduled Courses

Quick Search:

 Search Tips

Training Schedules

- Training Schedule
- Face-to-Face Schedule
- Live Online Schedule
- STOP & Learn Schedule
- Self-Paced Courses

FAQs

- How to Register
- How to Request Training
- New OCLC Member and New OCLC Product Training
- Live Online Session Policy

What Is . . .

- Face-to-Face
- Live Online
- Self-Paced
- STOP & Learn

Top > Digital Imaging :

Digital Project Planning & Management Basics ~ FACE-TO-FACE -- NEW

Course Description

Digital Project Planning & Management Basics will provide the basic knowledge and skills needed to plan, implement and assess a digital project. The course will explore the following topics:

- Project Planning: Environment Scans, Needs Analyses, and Goal Development
- Project Management: Defining Tasks and Resources, Scheduling, and Tracking
- Financial Issues: Budgeting, Fundraising, and Contracting for Services
- Legal Issues: Copyright and Permissions
- Outcome Based Evaluation: Outputs, Outcomes, and Accountability

Learning Objectives

- Understand basic project management concepts for digital projects and when they should be used
- Identify potential obstacles that could impact a digital project and ways to minimize risk
- Describe the difference between outcomes and output measures

Intended Audience

The workshop is intended for library, archives, and museum professionals with experience in collections management or cataloging.

Course Hours

The course is designed as a two-day workshop, consisting of 12 hours of instruction.

Instructor: Bill Walker - [[E-Mail](#)] [[Bio](#)]

Contact Hrs: 12.00

Amigos Member Fee: \$ 525.00

Amigos Non-member Fee: \$ 675.00

[Go to Registration](#) [Back](#)

WWW.THDI.ORG



Courtesy of Texas State Library and Archives Commission

Texas Heritage

Digitization

Initiative

**Train
to Share**

Funded in part by a grant from



**TEXAS STATE LIBRARY
AND ARCHIVES COMMISSION**

In partnership with Amigos Library Services
and the University of North Texas Libraries

**CONTACTS: DANIELLE PLUMER, dplumer@tsl.state.tx.us
KAREN FRIZZELL, kfrizzell@tsl.state.tx.us**



Digital Project Planning & Management Basics



Workshop Evaluation

Workshop Date: _____

Workshop Location: _____

Workshop Trainers: _____

In order to evaluate our continuing education offerings we need information from you about the effectiveness of this workshop. Please take the time to fill out this form and turn it in before you leave today.

BEFORE attending this program, I would rate my knowledge, familiarity or confidence with:

	Low				High
	1	2	3	4	5
Scope of a digital project and the desired results	1	2	3	4	5
Elements of a project management plan for digital projects	1	2	3	4	5
Skills needed to develop a project budget and funding strategy	1	2	3	4	5
Legal issues that could jeopardize a digital project	1	2	3	4	5
Criteria for assessment and selection of tools to evaluate outcomes	1	2	3	4	5

AFTER attending this program, I would rate my knowledge, familiarity or confidence with:

	Low				High
	1	2	3	4	5
Scope of a digital project and the desired results	1	2	3	4	5
Elements of a project management plan for digital projects	1	2	3	4	5
Skills needed to develop a project budget and funding strategy	1	2	3	4	5
Legal issues that could jeopardize a digital project	1	2	3	4	5
Criteria for assessment and selection of tools to evaluate outcomes	1	2	3	4	5

General Questions:

	Poor				Excellent
	1	2	3	4	5
The general quality of instruction was	1	2	3	4	5
The time allotted for this course was	1	2	3	4	5
Overall, I considered this workshop to be	1	2	3	4	5

What aspect(s) of this class could be improved? _____

How will you use the information gained from this workshop at your institution? _____

Would you be interested in taking more courses in this series? _____

Your Institution and Position:

- | | | |
|--|---|--|
| <input type="checkbox"/> Archives Director | <input type="checkbox"/> Library Director | <input type="checkbox"/> Museum Director |
| <input type="checkbox"/> Archives Professional | <input type="checkbox"/> Library Professional | <input type="checkbox"/> Museum Professional |
| <input type="checkbox"/> Archives Assistant | <input type="checkbox"/> Library Assistant | <input type="checkbox"/> Museum Assistant |
| <input type="checkbox"/> Archives Volunteer | <input type="checkbox"/> Library Volunteer | <input type="checkbox"/> Museum Volunteer |
| <input type="checkbox"/> Other: _____ | | |

Comments:

 Please share any other comments you may have: _____

THANK YOU!