



Planning

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Learning Objectives

In this module we will:

1. Go through the elements and resources needed to start a digitization project
2. Learn how to organize tasks
3. Briefly demonstrate the planning process



RESOURCING



RESOURCING

Good planning begins by defining the **ELEMENTS** that will have an impact on your project and understanding the **INTERACTIONS** between them

Affiliations

Stakeholders

Roles

Tasks

Goals



What is MOBILIZATION?

TWO types of Resources

- **Hardware**
- **People**



RESOURCES -

HARDWARE

- Things used to create and manipulate digital files

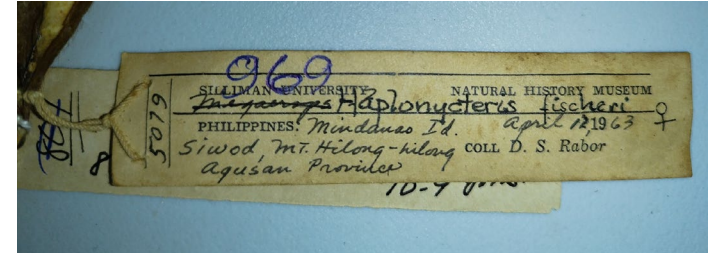
Computers

Cameras

Desk

Catalog sheets

Specimen Labels



RESOURCES - PEOPLE

- Individuals

1. **Affiliations** – group or business unit that stakeholders report to

2. **Stakeholders** – informal or formal groups of responsibility that will affect project success

3. **Roles** – actual individuals



PEOPLE - AFFILIATIONS

- **Institutional**
 - + Museum
 - + University
- **Project**
- **External**
 - + Local Government Units
 - + Regional & National Government
 - + NGOs



PEOPLE - STAKEHOLDERS



COLLECTIONS



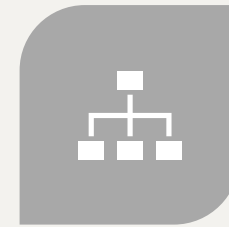
TECHNOLOGY



DIGITIZATION



WEB TEAM



ADMINISTRATIVE



PEOPLE - ROLES

Collections
Manager

Transcriber

Web Developer

Researcher

Network
Administrator



TASKS

- Specimen/Object Staging
- Curation; Data Review
- Database Review
- Hiring Staff
- Equipment Purchasing
- Equipment Setup
- Database Modifications
- Image Capture
- Transcription
- Data Cleaning/ Quality Checking
- Georeferencing
- Specimen/Object Return
- Publishing



GOALS

- Deliverables, due dates, deadlines

+ **Stated** (e.g. Publishing data)

+ **Implied** (e.g. increased public awareness)

- **Implied/Indirect Goals - breakdown into direct deliverables**

(e.g.

GOAL = Capacity Enhancement
+ Regional IPT installed
+ # of trained collection managers



REVIEW



Good planning begins by defining the five elements and understanding their interactions



Steps to assess project environment:

1. Review your GOALS
2. Research TASKS
3. Assign RESOURCES



ORGANIZING



ORGANIZING

Successful implementation is dependent on the development of **realistic, efficient, and streamlined** processes

Groupings

Clustering

Workflow

Documentation



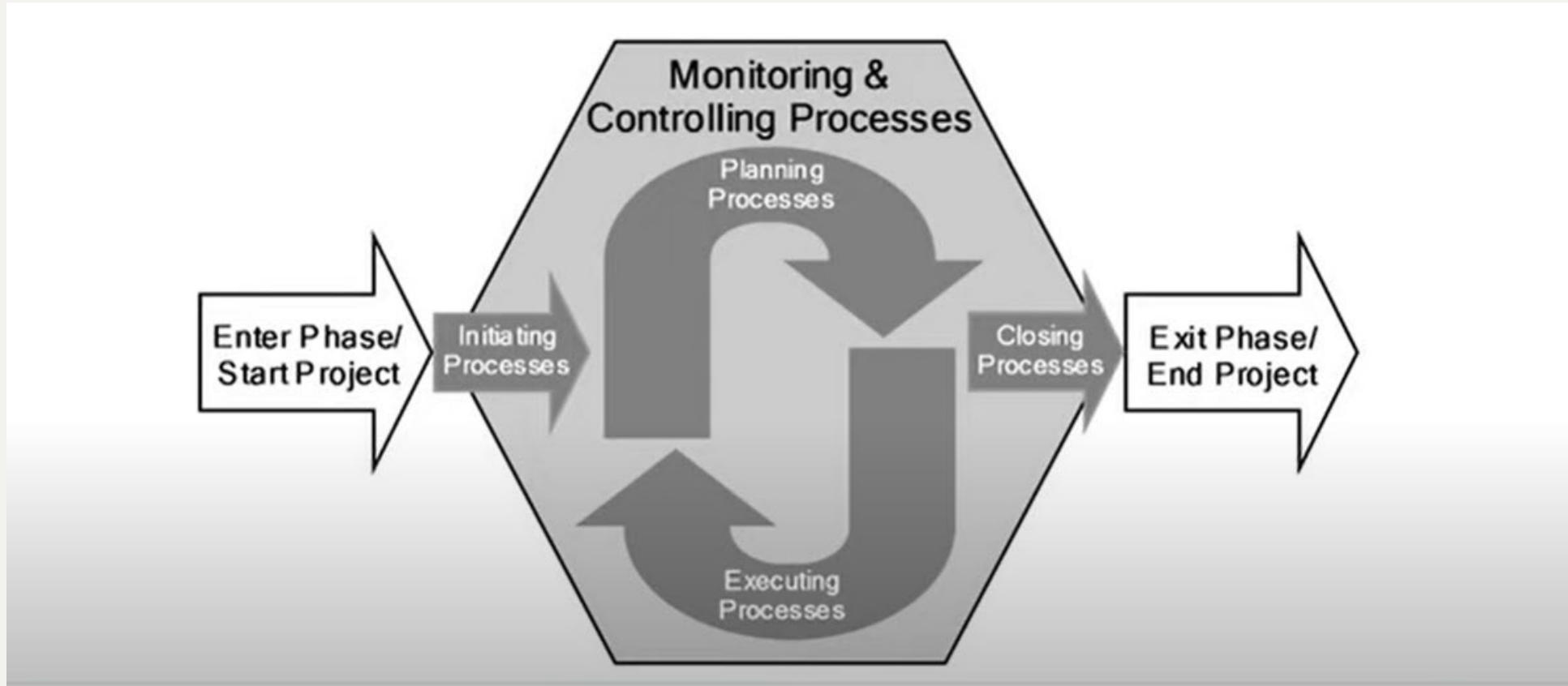
GROUPING

Based on stages (time)

- SIMPLE – points relative in time (e.g. **Before, During, or After** Digitization)
- PMBoK – Process groups (stages) (Initiating, Planning, Executing, Monitoring, & Closing)



PMBok Process group flow diagram



CLUSTERING

based on similarity

- For natural history digitization projects:
 - +Pre-digitization curation and staging
 - +Specimen image capture
 - +Specimen image processing
 - +Electronic data capture
 - +Georeferencing locality descriptions

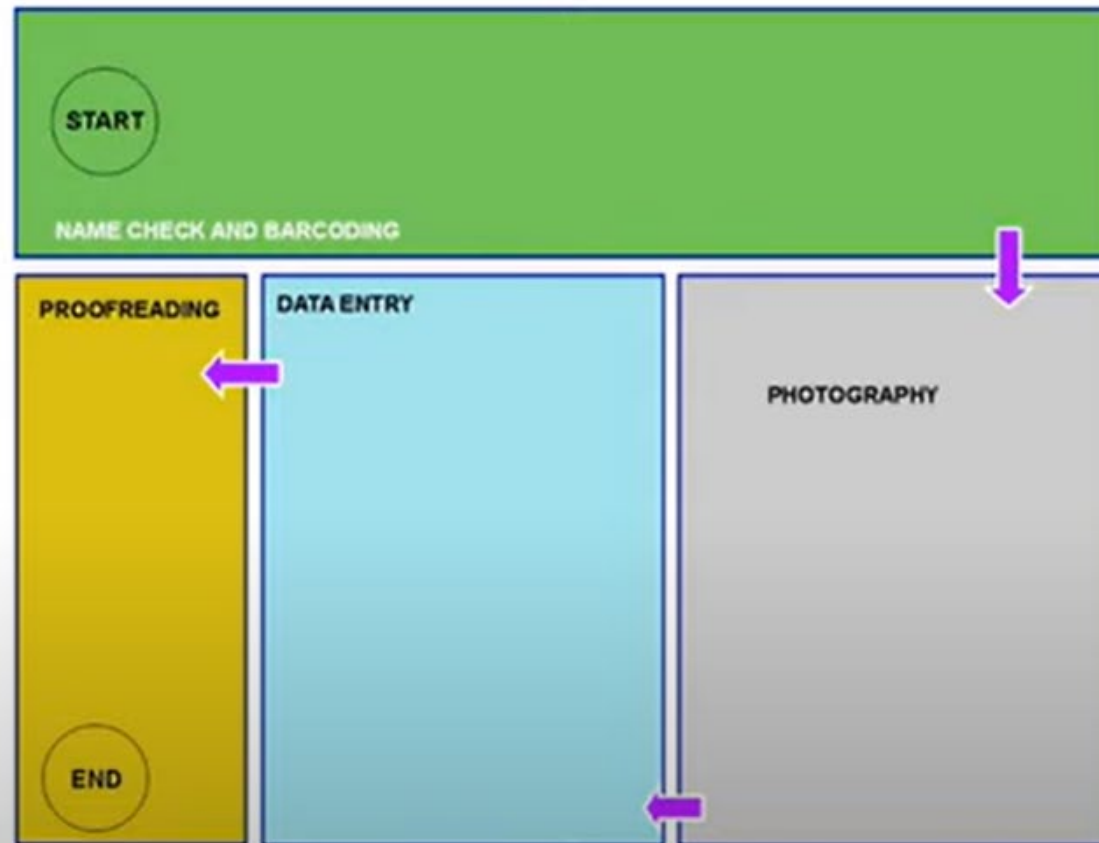


WORKFLOWS

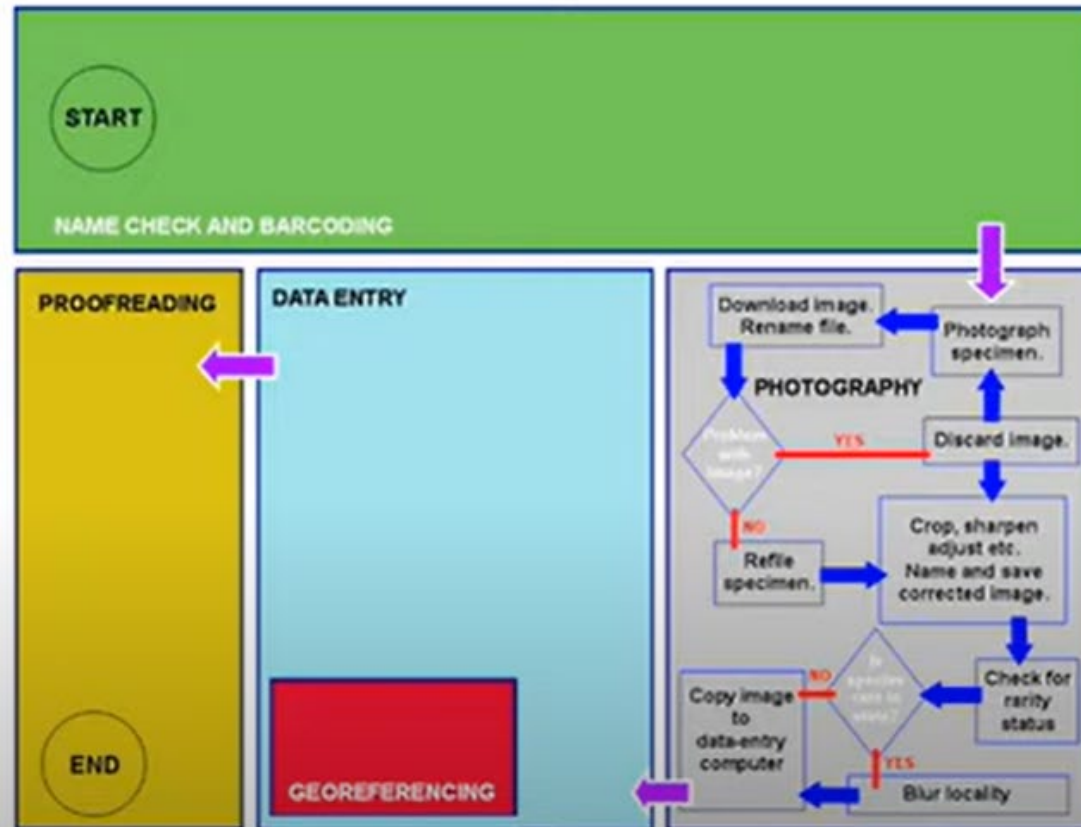
- “The sequence of processes through which a piece of work passes from initiation to completion
 - + Sequential - series of steps; performed strictly one after the other
 - Simple
 - Linear
 - + Rule-driven - rules and business logic can alter the progress
 - Logic-based
 - + State machine - can be triggered by actions and states in previous steps
 - Complex
 - Asynchronous



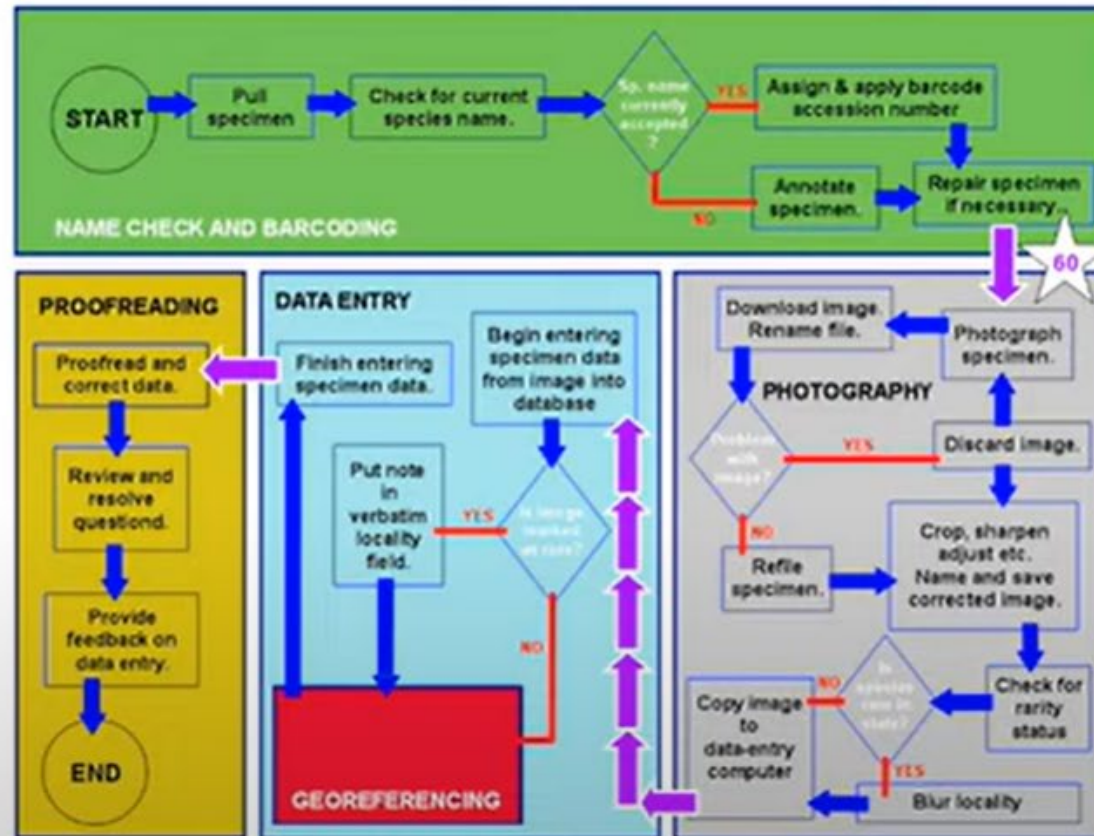
Sequential Workflow



Rules-driven Workflow



State-driven Workflow



DOCUMENTATION

- Accounting of responsibilities & achievements/milestones
- Continuous refinement of your documentation is essential to successful planning and communication of your project



BOTTLENECKS, GAPS, & BARRIERS

- BOTTLENECKS

- +A blockage that delays development or progress

- GAPS

- +A space where something or someone is missing

- BARRIERS

- +A problem, or situation that prevents somebody from doing something , or that makes something impossible



REVIEW



Successful implementation is dependent on the development of realistic, efficient, and streamlined processes and documentation



Groupings - divide project into manageable stages based on specific criteria



Clusters - describe most common natural history set of digitization tasks



Workflows - connect tasks and task clusters into logical sequences



Documentation - moves from the high level proposal continuously to the final report



END OF

PRESENTATION



LINKS FOR DEMO

SCENARIO

[Biodiversity Data Mobilization Course \(gbif.org\)](https://gbif.org/courses/biodiversity-data-mobilization-course)

CARD GAME

[gbif-dm-blue · ndqppx · PlayingCards.io Virtual Tabletop](https://gbif-dm-blue.ndqppx.com/PlayingCards.io)

ROLE DEFINITIONS

[ROLE CARDS DEFINITIONS · fieldmuseum/planning-cards Wiki · GitHub](https://fieldmuseum/planning-cards)

SUGGESTED SOLUTION

[UC1-Herbarium-Suggested-Solution EN \(gbif.org\)](https://gbif.org/uc1-herbarium-suggested-solution-en)

