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)
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
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
• 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
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.
SCENARIO

Biodiversity Data Mobilization Course (gbif.org)

CARD GAME

gbif-dm-blue · ndqppx · PlayingCards.io Virtual Tabletop

ROLE DEFINITIONS

ROLE CARDS DEFINITIONS · fieldmuseum/planning-cards Wiki · GitHub

SUGGESTED SOLUTION

UC1-Herbarium-Suggested-Solution_EN (gbif.org)