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Making It Happen: Tools & Tips for Effective Archival Project Management





History Associates INC.
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Making It Happen: Managing Project Workflow

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Presentation Outline

- Brief project overview
- Workflow management challenge
- Workflow management solutions
 - Training/Knowledge Sharing
 - Standardized Project Tools
 - Workflow Tracking
- Take Away Advice





Project Scenario: National Park Service Archival Services Contract

- HAI awarded contract in 2010
- Goals: Survey, Arrange, Describe
- Extensive archival backlog
(38 million items)
- 60+ sites

Surveyed: ~12,000 LF

Processed/Cataloged: ~6,000 LF





Project Challenges

- Site Specific Differences

 - + needs (national, regional, site)
 - environment

- Hiring

WORKFLOW



Challenge: Managing Workflow

One streamlined course of action

- Many site projects
- Many teams
- One central HAI office

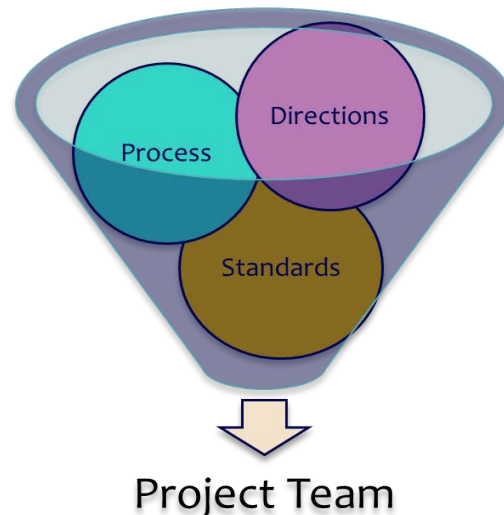




Workflow Training

Solutions: Training

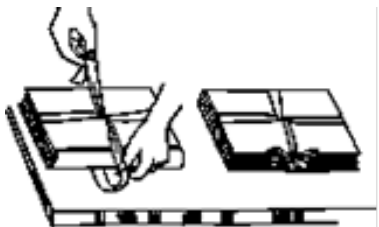
- Face to face meetings
- Periodic site visits
- Recorded sessions
- Written documentation



Solutions: Project Workflow Manuals/Guides

Processing manuals might include:

- Disposition guidelines
- Preservation actions
- Supply lists
- Rehousing guidelines
- Box/Folder templates
- Digital, Audio, Photographs, Oversized





Standardized Project Tools

Solutions: Templates

BOX LABEL INFORMATION	PARK BOX NUMBER	LOCATION LH = Long House MB = Metal Bldg	BOX TYPE	SHELF SPACE VOLUME IN INCHES	GENERAL DESCRIPTION OF CONTENTS	BOX CONTENTS VOLUME IN INCHES	CURRENT ARRANGEMENT	DATE RANGE	PHOTOGRAPHS /AUDIOVISUAL MATERIALS - VOLUME	DRAWINGS/ OVERSIZE MATERIALS - VOLUME	PRESERVATION PHOTOCOPYING - VOLUME	POTENTIAL CULLING - VOLUME
NPS--Administrative Records 1940s-1970s	HAI-A	LH, Shelf 41	RC	12	Hampton SPMA (Society for the Preservation of Maryland Antiquities) Committee files on the tea room, mansion reroofing, and other site projects; Women's Committee for Hampton folders; Bicentennial correspondence; Lilly Fund donation dispute; Hampton Committee meeting minutes; financial reports; Hampton Trust minutes, correspondence, and by-laws; general administrative materials on park designation, management objectives, conference, laws/legal issues; Hampton Treasurer's reports/reports of operations. THESE ARE COPIES OF LETTERS BY THESE COMMITTEES TO OTHERS OR ORIGINALS OF LETTERS SENT TO THOSE COMMITTEES	15	none	1951-1983		0 legal-size: 0.5 in	3	0.5
Contract/Project Files c. 1980-1986	HAI-B	LH, Shelf 41	black plastic bin	14.5	Superintendent's copies of contract files for various site construction and maintenance projects: includes bid solicitations, contracts, payment approvals, requisitions, work orders, projects manuals, oversize construction drawings, etc. Many sent to the Regional Director through the Superintendent from the Site Manager	9	none	1981-1985		0 oversize: 0.5 in	0	0.25
Box #12; (FOMC) Superintendent's Files re: Hampton NHS c. 1960-1979	HAI-C	LH, Shelf 40	RC	12	Superintendent's office central files A, C, D, F, H. First few files were pulled apart from original central files and refiled with subject heading folder titles, and these include notes on the original central file alphanumeric codes.	11	roughly by alphanumeric code	1957-1982		0 legal/oversize: 1 in	1	0.25
Archives--Site Superintendent's Office; 1) Development Proposals/Study Packages; 2) Site Superintendent's Work Files/1983-1999	HAI-D	LH, Shelf 40	RC	12	Superintendent's inter-office correspondence, reports, and procedures files with various subject headings; development study package forms, 1970s-1990s; in-house newsletters	9	none	1961-1999		0 oversize: 0.125 in	0	0.25
(FOMC) Superintendent's Files re: Hampton NHS 1948-1959; Contract Documentation re: Restrooms in Mansion Basement -Plumbing -Floor Reinforcing & Heating -Blueprints	HAI-E	LH, Shelf 40	RC	12	Superintendent's chron files of correspondence, memos, reports of operations, land ownership records, etc. (old file code system); Superintendent's copies of contract files for various site construction and maintenance projects	11	reverse chronologically	1947-1959	some fragile documents may require photo sleeves (10-25ish)	legal/oversize: 1.5 in	1	0
(FOMC) Superintendent's Records re: Hampton NHS c.										legal/oversize:		

Individual Finding Plan Overview Sheet

Date of Plan
Click here to enter a date ▼

Name: Choose site name

Park Acronym: CHOOSE SITE

Name of Collection: Full name of collection or record group

Accession Numbers: #####

Records Creator: Name/s of person/people/organization

Volume #: # LF

Proposed Hierarchy and Arrangement Statements

Arranged into number of series series:

SERIES 1: SERIES NAME, date range and/or undated

SUBSERIES A: SUBSERIES NAME, date range and/or undated
(Arranged by _____) [if no sub-subseries]

SUB-SUBSERIES 1: SUB-SUBSERIES NAME, date range and/or undated
(Arranged by _____)



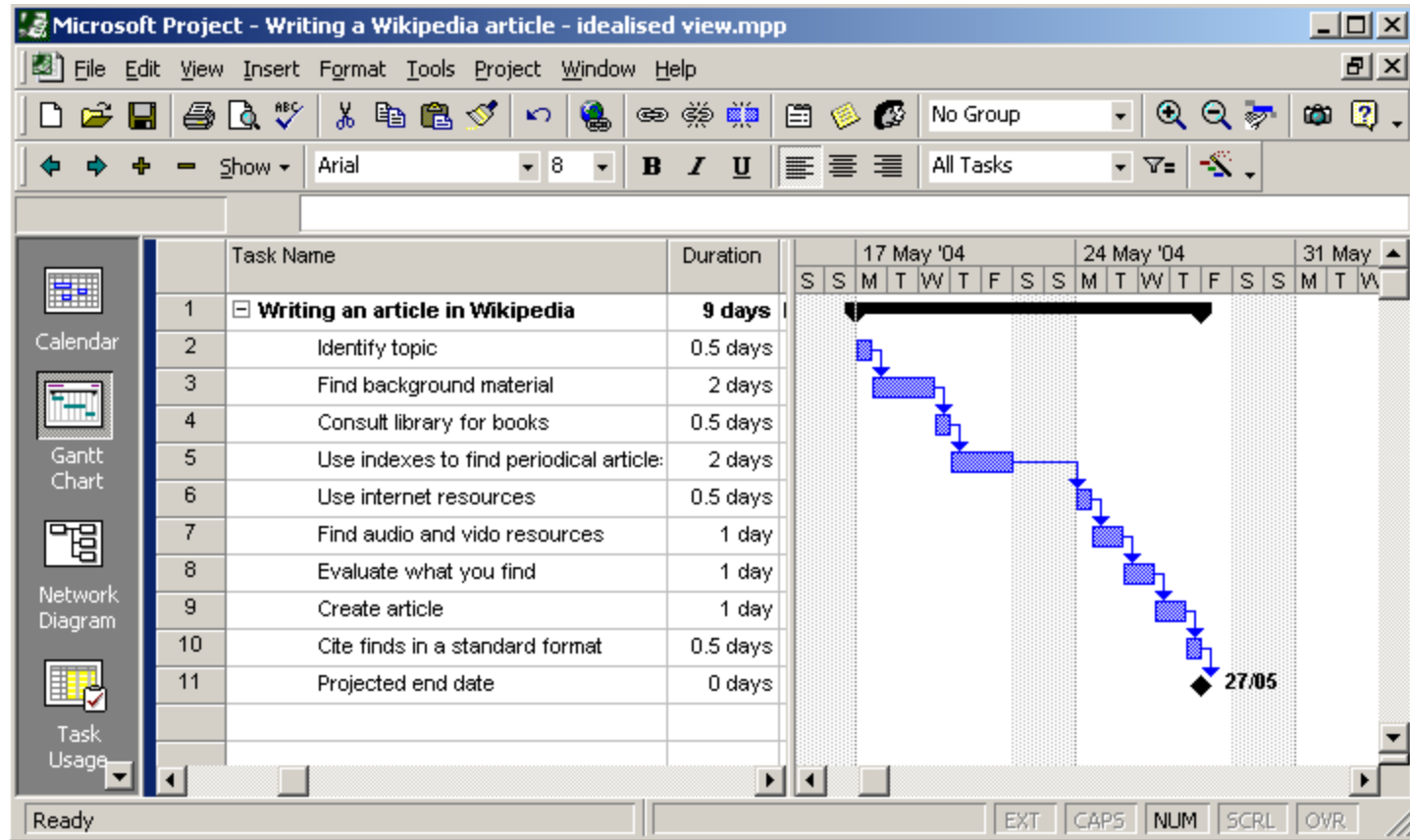
3B	Cataloging (description) of each collection for every hierarchical level above the file unit level (i.e., the collection level, the series level, the subseries level, the sub-subseries level, etc., as appropriate), plus preparation of container lists for each collection. To include appropriate automated Finding Aids for archival collections or portions of archival collections in accordance with a submitted and approved site plan for 10 LF of archival collections or portions of archival collections in accordance with a submitted and approved site plan. Work to be done at an approved Contractor or Other Site.			
4A	Cataloging (description) of each collection for every hierarchical level above the item level (i.e., the collection level, the series level, the subseries level, the sub-subseries level, etc., as appropriate, including full description at the file unit level . To include appropriate automated Finding Aids for archival collections or portions of archival collections in accordance with a submitted and approved site plan for 10 LF of archival collections or portions of archival collections in accordance with a submitted and approved site plan. Work to be done at Site.	2	\$3,519.00	\$7,038.00
4B	Cataloging (description) of each collection for every hierarchical level above the item level (i.e., the collection level, the series level, the subseries level, the sub-subseries level, etc., as appropriate, including full description at the file unit level . To include appropriate automated Finding Aids for archival collections or portions of archival collections in accordance with a submitted and approved site plan for 10 LF of archival collections or portions of archival collections in accordance with a submitted and approved site plan. Work to be done at an approved Contractor Site.			
5A	Transportation by HAI.			
5B	Transportation by commercial carrier.			
5C	Transportation by fine art transportation service.			\$700.00
6A	Transportation by HAI.			
6B	Transportation by commercial carrier.			
6C	Transportation by fine art transportation service.			\$700.00
7	Archival Processing Supplies for 10 LF of cataloged/processed archives.	2	\$989.00	\$1,978.00
8	Insect extermination treatment or mold removal process for 10 LF of affected archives.			
9	Four hours of archival-related special services for undetermined or previously unknown issue within archives.			
10	Travel See Below	--	--	
TOTAL PROJECT COST				\$10,416.00
CLIN 5C and 6C – costs are based on the estimated cost to transport the material to be processed at HAI's facility via Artex Fine Arts Services. The cost is outlined below.				
Component		Cost		
Shipping shuttle (from [City, State] to Rockville, MD)		\$700.00		
Shipping shuttle (from Rockville, MD to [City, State])		\$700.00		
Total Transportation Cost		\$1,400.00		





Workflow Tracking Tools

Solutions: Microsoft Project



Solutions: Reporting Tools

Job Jar

1	Task Name	Duration	People Days	Total Hours	Start	Finish	Resource Count	% Complete	Notes
2	Shenandoah Phase 2 - MOD 1 Client Site	183 days	366 days	2912 hrs.	Tue 10/18/13	Thu 7/1/14	2	66%	# of days to complete all Processing & Cataloging
3	Processing Work - CLIN 2	150 days	300 days	2400 hrs.				80%	
4	Conduct Processing Survey	3 days	6 days	48 hrs.			2	100%	Standard 10% of Processing effort
5	Procure Supplies	1 days	2 days	16 hrs.			2	60%	Standard 1 day per MOD
6	Conduct Relhousing	44 days	88 days	704 hrs.			2	94%	# of days needed for remaining Processing effort
7	Conduct Photocopying	31.5 days	63 days	504 hrs.			2	85%	# of days needed for remaining Processing effort
8	Conduct Flattening	31 days	62 days	496 hrs.			2	57%	# of days needed for remaining Processing effort
9	Conduct Interfiling	32 days	64 days	512 hrs.			2	94%	# of days needed for remaining Processing effort
10	Closeout Work	7.5 days	15 days	120 hrs.			2	0%	Standard 5% of Processing effort
11	Cataloging Work - CLIN 3	28 days	56 days	448 hrs.				3%	
12	Write Finding Aid	22 days	44 days	352 hrs.			2	4%	Standard 80% for Cataloging effort
13	Enter data into Park System	6 days	12 days	96 hrs.			2	0%	Standard 20% for Cataloging effort - (at least 1 day)
14	Cataloging Work - CLIN 4	3 days	6 days	48 hrs.				17%	
15	Write Finding Aid	2.5 days	5 days	40 hrs.			2	20%	Standard 80% for Cataloging effort
16	Enter data into Park System	.5 day	1 day	8 hrs.			2	0%	Standard 20% for Cataloging effort - (at least 1 day)
17	Special Services - CLIN 9	2 days	2 days	16 hrs.				12%	
18	Archival Related Special Services Effort	2 days	2 days	16 hrs.			2	12%	Special Services hours purchased
19	Total	183 days	364 days	2912 hrs.					

Solutions: Reporting Tools - Status Sheets

B	C	D	E	F	G	H	I	J	K	L
Instructions		Status Complete								
Job Code	Unique ID	Resource Names	Task Name	Progress	% Complete	Projected % Complete	BL Start	BL Finish	HAI Deadline Start	HAI Deadline Finish
2881.092	1582	Alison Starkey,Tyler Cline,Chris Schunter	ARCC - Perform CLIN 2a - MOD 2 Work	In Progress	69%	65%	10/1/2012	12/31/2013	9/24/2012	12/19/2013
2881.093	1584	Chris Schunter,Alison Starkey	ARCC - Perform CLIN 3a - MOD 2 Work	In Progress	37%	26%	10/1/2012	12/31/2013	5/16/2013	12/19/2013
2881.052	2257	Colleen Williams,Brian Davis	HFCE - Perform CLIN 2a - MOD 2 Work	In Progress	96%	94%	6/7/2012	9/30/2013	9/24/2012	7/31/2013
2881.053	2258	Brian Davis	HFCE - Perform CLIN 3a - MOD 2 Work	In Progress	74%	47%	6/7/2012	9/30/2013	6/25/2013	7/31/2013
2881.013	2340	Jenna Marrone	INDE - Perform CLIN 3a - MOD 4 Work	In Progress	98%	100%	6/13/2013	9/30/2013	6/17/2013	7/19/2013
2881.012	2343	Jenna Marrone	INDE - Perform CLIN 3a - MOD 5 Work	In Progress	5%	2%	1/4/2014	9/14/2014	7/12/2013	8/2/2013
2881.023	1619	Annelise Doll,Stephanie Caloia	KEWE - Perform CLIN 3a - MOD 2 Work	In Progress	98%	100%	2/1/2012	6/30/2013	1/17/2013	7/19/2013



Solutions: Rhythm Charts

HAI Weekly Business Rhythms (Schedule & Risk)

Monday	Tuesday	Wednesday	Thursday	Friday
<ol style="list-style-type: none"> 1. Move Time Now 2. Input status into IMS 3. Generate Resource Allocation Metric 4. Generate Resource Usage Metric (Using tools for Phase 1 and 2) 5. Create NPS Tracking Metric (IMP view pasted from IMS) 6. Upon review send all material to PM and CFO in email. 	<ol style="list-style-type: none"> 1. Conduct Schedule & Risk Review - facilitate discussions and review metrics (capture minutes) 2. Make any necessary updates to the IMS (i.e. - additional status updates provided in meeting) 	<ol style="list-style-type: none"> 1. Continue making updates to IMS and metrics from Tuesday's meeting (if necessary) 3. Send latest updates to the DB (export tool) with last Friday's data date 4. Updates Parameters in DB 5. Refresh Schedule Status Sheets and send in email to PM (CC CFO) 6. Refresh Job Jar Template and create new worksheets (if necessary) <ol style="list-style-type: none"> 1. Begin data collection for Status Sheets 		<ol style="list-style-type: none"> 1. Send out email reminder to PM that Status Sheets are due today. <ol style="list-style-type: none"> 1. Status Sheets due by COB <ol style="list-style-type: none"> 1. Monthly actuals due twice a month. (see below)



What Does This Mean for You?

Take Away Advice

- ➡ **DEVELOP** effective processes for workflow management
- ➡ **TEACH** processes and tools - in advance and continually
- ➡ **TRACK** workflow and progress to evaluate success
- ➡ **APPLY** lessons learned to future projects



Thank you!

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Feedback or Questions?

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