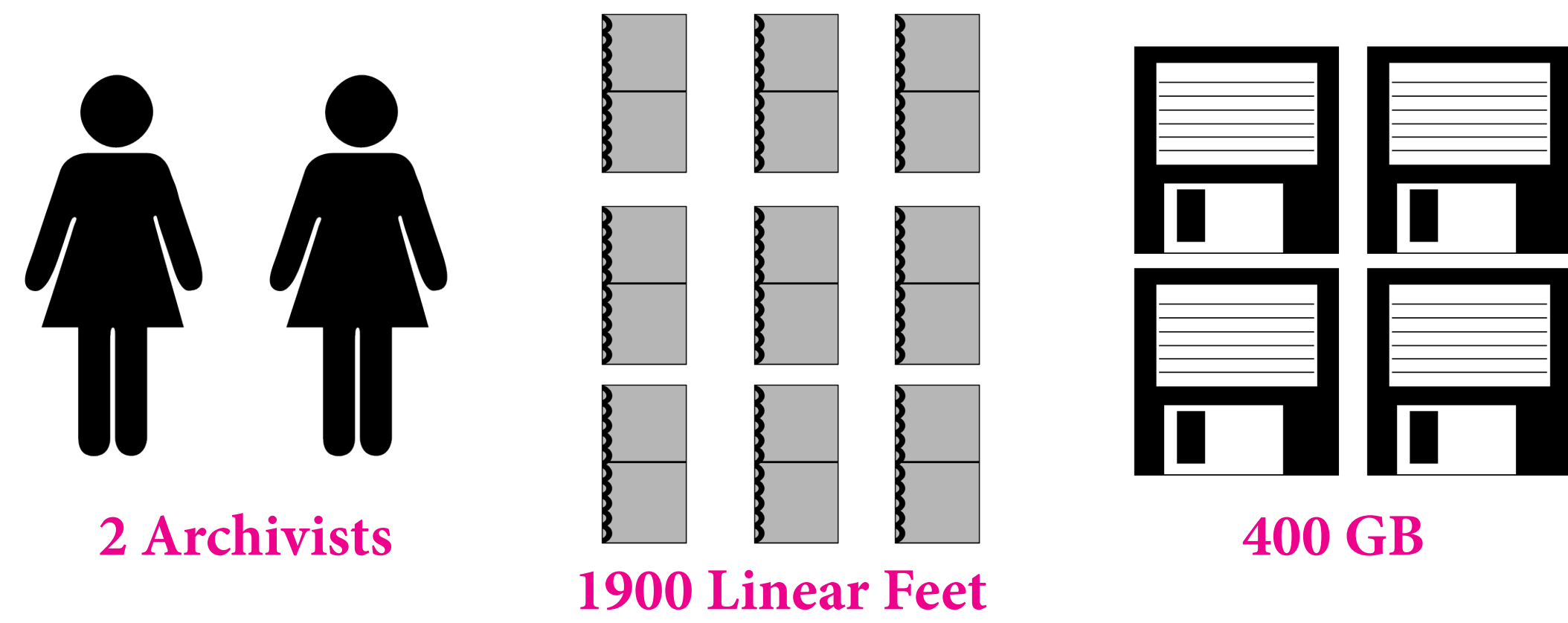


DROWNING IN BINDERS, LOST IN BYTES

Project Management in Large, Hybrid Congressional Papers Collections

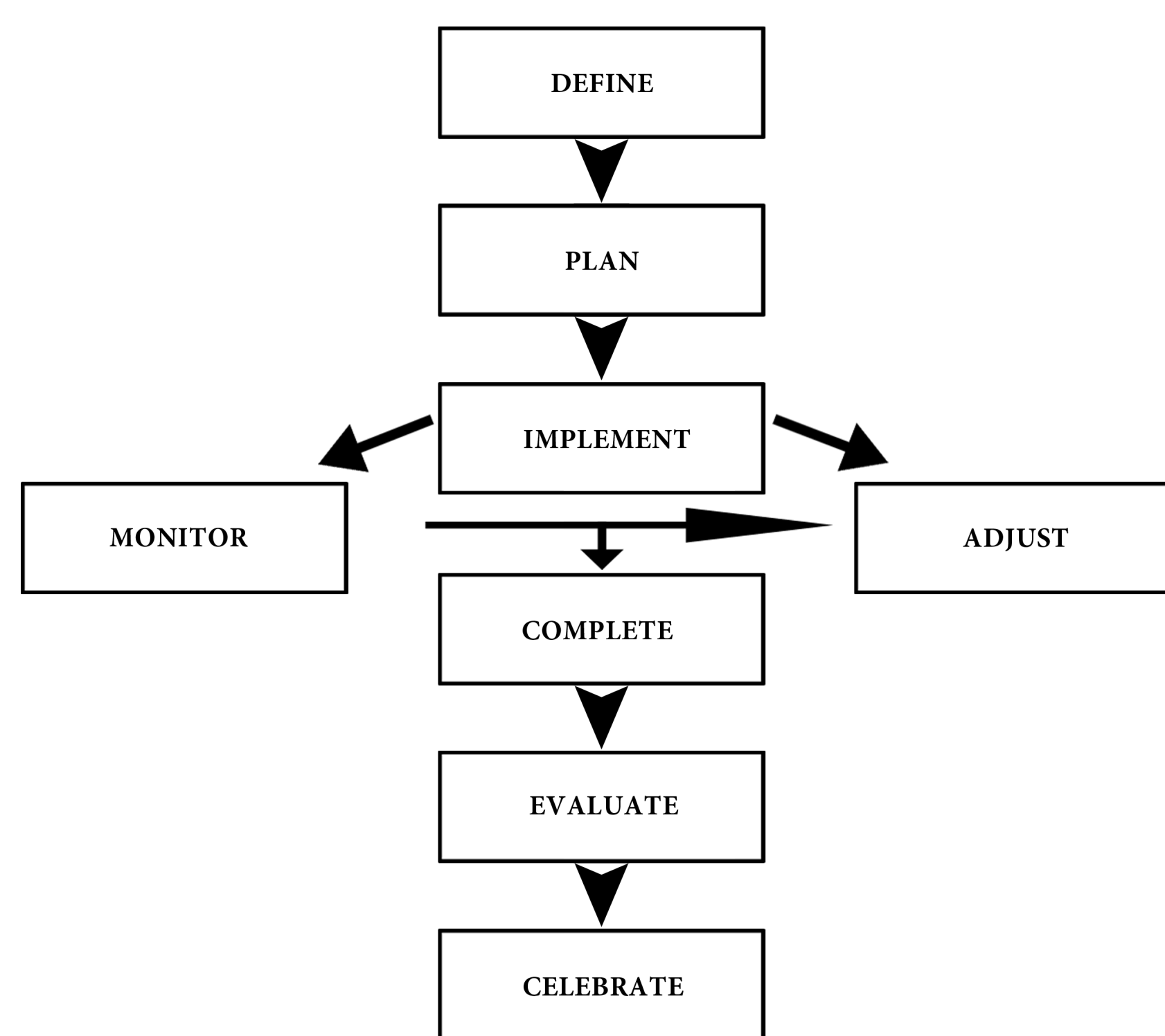
THE PROBLEM

Two archivists have two years to develop and implement electronic records policies and workflows and process two hybrid congressional collections.



THE (POTENTIAL) SOLUTION

The Project Management Institute defines **project management** (PM) as “the application of knowledge, skills and techniques to execute projects effectively and efficiently.” PM provides structure and steps to keep you on track, methods for developing a plan that addresses goals, risks, and constraints, and a model for implementing and monitoring the project as it progresses. *And* the documentation produced helps to facilitate communication, confidence, and evaluation.



Sources:
 Allan, Barbara. Project Management: Tools and Techniques for Today's ILS Professional (London: Facet Publishing), 9-10. Pleva Flynn, Rosemary. "Project Management for Archivists" (workshop presented at Indiana University Bloomington, March 2, 2012). "What is Project Management?," Project Management Institute, accessed July 4, 2013, <http://www.pmi.org/About-Us/About-Us-What-is-Project-Management.aspx>

THE METHOD: PLANNING

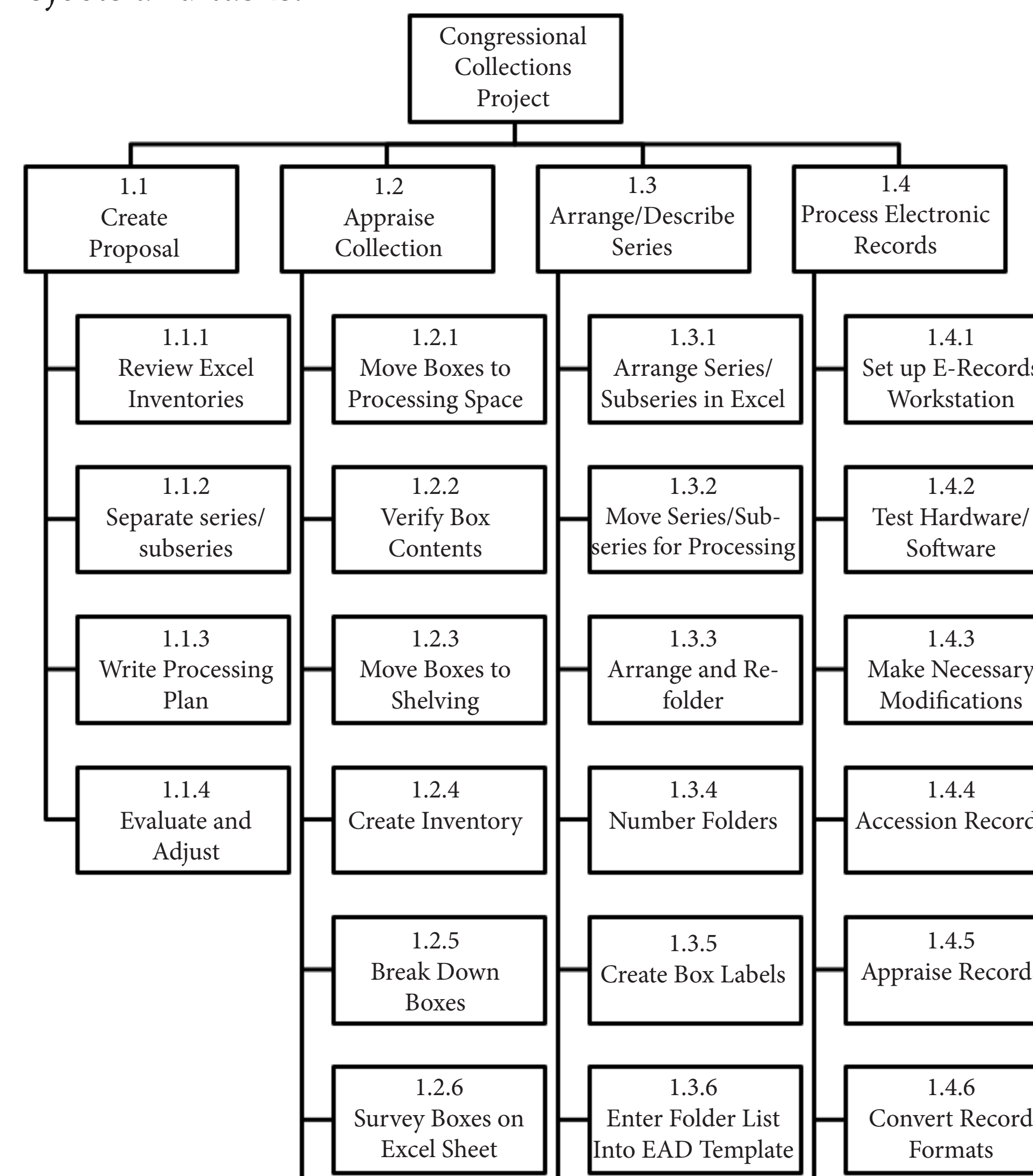
Perhaps one of the most important PM steps is defining the project. We defined our project's objective, scope, deliverables, constraints, risks, and associated groups, among other aspects:

The **objective** is the project's goal: appraise, arrange and describe the senatorial papers of Vice President Joseph R. Biden Jr. and former U.S. Senator Edward E. (Ted) Kaufman.

The **scope** outlines those tasks that are included in the project: create processing plans, appraise materials, arrange and describe paper and electronic materials according to the processing plans, and create an electronic records policy and workflow.

The **deliverables** are the project's products: paper and electronic records arranged according to the processing plan, EAD finding aids, and electronic records management procedures.

A **Work Breakdown Structure** (WBS) defines the project's sub-projects and tasks.



Planning brings everything together and sets the course for how the project will be completed. A formal project plan solidified our goals, set a schedule and provided a work overview.

THE METHOD: IMPLEMENTING

Implementation is the point where the work begins. We follow the steps in the WBS to begin appraisal, arrangement, and description of both the papers and electronic records. This stage includes monitoring and adjusting the project plan and making revisions as necessary.

Even with a plan, unexpected issues can set the project back. Implementing new technologies, creating new working relationships, and determining record custody have all been challenges in our project. The key is to identify new options and communicate changes to all those involved in the project.

FINDINGS: LESSONS LEARNED

PM brings structure and focus to a project.

The defining and planning stages proved more important than PM software.

PM tools and software are most useful for the planning stage and generation of reports, but they have not been necessary to implement the project.

Tools and software don't need to be complicated or incredibly sophisticated. We looked for solutions based on these criteria:

- Cost** - inexpensive or free
- Usability** - needs to be relatively easy to learn
- Functionality** - track changes and impacts
- Report Generation** - to document the project
- Access** - allows multiple users

Strategies that are working for us:

- Whiteboard with weekly task lists and assignments
- WBS to follow the overall structure of the project
- Spreadsheet for tracking task start/end dates and statuses
- Communication with email and face-to-face meetings
- Weekly reports that document progress