Project Management Plan

Projects change over time, and so do project management plans. Use this worksheet to help you put your benchmarks, obstacles, tools, and partners into context with your overall project goals. View sample project management plans here:

- Smith Papers Project (MUW)
- Maryland Public Television (U of MD Libraries, from DLF Wiki)

I. Project Purpose and Description

1. Describe the purpose of the project and why it is a worthwhile pursuit.

2. What are some values that are important for the work you're doing now, in this group, on this project?

3. What are the major goals of the project?

II. Project Partners

Shared values and priorities create cohesive teams with deliberate plans that include details that often get overlooked, like how to communicate, organize, direct, give credit, and document the progress of the labor. Sample value statements:

- CollectionBuilder Code of Conduct
- Colored Convention Project Principles

Team Dynamic

1. Describe the spirit in which your group will work together.

2. What are the group's priorities for the project?

3. What are the various levels of expertise, and in what areas do you need more training?

Communication

1. What medium will you communicate with each other about the project (e.g., text messaging, email, Google group, an app like Slack, etc.)?

2. Where will you store your in-progress files (e.g., Dropbox, Google Drive, server, Github etc.)?

3. When you work on a document collaboratively, how will you ensure that you don't overwrite each other's changes?

4. How often will you meet, and where? Are in-person meetings (or virtual) important to the project?

Roles and Expectations
Describe the roles of each of the project members below, and how they'll contribute to the goals of the project.

Sustainability[1]
How long do you plan on developing your project?

What would you like your project's digital lifespan to be?

What maintenance will the project require after it has been "completed," and who will ensure that maintenance?

Will your project take other forms, digital or otherwise?

III. Data Management[2]

Think through the different types of data and the different resulting file types associated with your project. A data management plan helps you keep up with this, and it also asks you to think about the potential issues that can arise from this arrangement.

1. Provide a brief description of the information to be gathered -- the nature, scope, and scale of the data that will be generated or collected.

2. Are you using any metadata or digitization standards? Do they need modifications for your project?

3. How will you ensure high enough quality of any files created for your project?

[1] Adapted from *The Socio-Technical Sustainability Roadmap*, June 2022
[2] Adapted from Sara Ketchley, DH 101 Project Charter Assignment, University of Washington

4. What ways are you backing up your work? (Recommended forms include "near," as in a local computer, "far," as in an external drive, and "very far," as in a cloud service)

5. Is there any sensitive data you'll be potentially working with? Imagine a scenario in which something you find in your dataset could potentially have a negative effect on someone.

6. Who is the potential audience that will access the data you're creating? How are you ensuring they are able to access the materials?

IV. Workplan

Sketch a timeline of the project's progress or goals with dates and benchmarks. The plan must lay out clear, core deliverables, and be broken down into small, manageable chunks, but should remain flexible to account for reasonable setbacks.