MANAGING BASS CONNECTIONS
PROJECTS & TEAMS

May 7, 2019

This is a consolidated slide deck from the Bass Connections Project Management Bootcamp hosted by the Duke Libraries.

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• Managing Stuff: Files and Processes: Pg. 31
• Managing Communication: Pg. 66
• Managing People, including Yourself: Pg. 92
MANAGING PROJECTS

Scoping & Planning

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Managing Projects: Scoping & Planning

Session Overview

- Project Planning: Why Bother?
- The Triangle: Project Scope & Limits
- Plan > Do > Review
- The Project Charter
- Tools & Other Resources

Session Goals

- greater clarity about your project's goals, limits, and resources needed
- appreciation of the value of planning (especially communication)
- tools & processes for defining & managing your project
- practice planning your project
PROJECT PLANNING: WHY BOTHER?

A lesson from Charlie Brown
The Plan

• Unilateral
  • Presented, not discussed

• Lacks clarity
  • What does “share Thanksgiving” mean?

• Doesn’t consider constraints
  • Charlie’s family is going to his grandparents for Thanksgiving
  • Charlie doesn’t know how to cook

“My dad’s been called out of town. He said I could go over to your house and share Thanksgiving with you, Chuck!”
The Outcome

• Success!
  • *Dinner delivered on time, using existing resources, to meet stated objective of sharing Thanksgiving with friends*

• Failure!
  • “What’s this? A piece of toast? A pretzel stick? Popcorn? What kind of Thanksgiving dinner is this?!”
Perspectives from past project teams

■ “I feel like I'm trying to work on a project I don't understand and my skills are not being used well, because I keep getting "assigned" to do things by the group that I don't know how to do.”

■ “Goals and roles have been a bit fuzzy across the past year. If we had solid, clear roles and solid, clear, quantifiable goals ... there would be a higher rate of personal commitment to the team.”

■ “Clearly define what the goals are and outline 1. what needs to be done, 2. who will do it, and 3. when those action items should be finished.”

■ “Being flexible and listening to the responses of the rest of the group/team members is paramount.”
To improve your project’s outcomes...

- **Communicate** effectively  
  (listen, clarify, document, share)
- Define project **scope**  
  (what must & can be done, within known constraints)
- Have a **plan**  
  *(who will do what when)*
- Actively **manage** the project*  
  *(communication, scope & limits, plan, & expectations)*

*The more people & interests involved,  
the greater the need for project management.*
THE TRIANGLE

Project Scope = Goals + Time + Resources
Project Goals & Limits

Key objectives for successfully completing a project

• Meet project goals
• On time
• With available resources
Goals help define time and resources. (Some goals do this better than others.)

1. Design and implement an ecologically sensitive yet convenience-oriented platform for housing and managing domestic requirements at the individual level.

2. Create a space for someone in a tree.

3. Build a studio-style single-individual living space between trees; with sewer, water, and electricity capability; sufficient height to guard against flooding; with components that can be adapted and assembled by a semi-skilled workforce in eight to twelve weeks.
Project Goals & Limits

Time & Resources are aspects of reality that influence each other and the goals.

As you have more or less of one, it increases or decreases the other two.

If the Goals increase, you’ll need more time and/or resources (scope creep).
Project Scope = Goals + Reality

TIME
■ When must the work be done?
■ How long will it take to do the work?
■ What could slow down your progress?
■ What would help you go faster?

RESOURCES
■ What do you need in order to do the work?
■ How will you do the work?
■ Who will do the work?
■ How much will the work cost?
Project Treehouse

Build a studio-style single-individual living space between trees; with sewer, water, and electricity capability; sufficient height to guard against flooding; with components that can be adapted and assembled by a semi-skilled workforce in eight to twelve weeks.

- What tasks are involved in creating the treehouse?
- In what order do the tasks need to happen?
- How much time will each task take?
- How much time will the entire project take?
Using the Bass Connections project you’ll be working on, consider:

- What aspects of this triangle can you already fill in?
- Which aspects of the triangle are least flexible?
- Which aspects of the triangle are most flexible?
Project Planning: What do I need to consider?

**Project Goals & Objectives**
- What do you hope to accomplish? and Why is it important to accomplish this?
- What will be the specific outcomes?

**Project Limits**
- **TIME:** What is the time frame? What are key deadlines & milestones?
- **DELIVERABLES:** What are the intended outcomes? What steps & tasks are required to reach them?
- **PEOPLE:** Who is involved (team and stakeholders)? What are their goals? What are their roles and responsibilities?
PRACTICE | Objectives & Limits

Objectives

- Using the project proposal or other project descriptions provided to you, write down what project will involve
  - What must be accomplished?
  - What steps are involved?
  - What tools are needed?
  - What skills are needed?

Limits

- Using information you have so far about the project team and the team’s resources, write down what project has
  - How many people?
  - What skills do they have?
  - What resources are available (training, assistance, tools)?
Compare notes

With a partner, discuss whether there are questions about each other’s objectives & limits:

- Is the goal of the project narrow enough to be accomplished with existing resources?
- What is not in scope (i.e., not part of goals, not accomplishable with resources?)
- Are there other resources available?
- What risks or weaknesses do you see in your current project? How might you address these?
- *What questions do you need to answer, and whom might you ask?*
PLAN ➞ DO ➞ REVIEW

Estimating and Managing Time and Tasks
Project Management Triumvirate

**PLAN**
ask questions, generate ideas, consider options, prioritize, gather resources, organize and schedule effort

**DO**
active hands-on, heads-on time on task

**REVIEW**
consideration of the effort, measurement of results against expectations, opinion-gathering from others, reflection, lessons learned
Thirds Approach to Time & Tasks

- Divide time on the project equitably between planning, doing, and reviewing.
- For every task, anticipate that you’ll need to spend time planning what you’ll do and assessing what you did, in addition to actually doing.
THE PROJECT CHARTER
Value of shared project planning

**Clarity:** clarify the project parameters (resources available, project goals and desired outcomes, team and roles, and limitations)

**Communication:** remind you (and others, including future you) of the project’s goals and limitations, and everyone’s role and responsibilities

**Commitment:** ensure that individual goals are sufficiently aligned with team goals, helping promote engagement and investment in the project

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**Project Charter Template**

**INTRODUCTION**

A project charter can help ensure that everyone is on the same page with respect to where you are going and how you will get there.

Working through these questions will give your team both focus and direction as a starting point toward meeting your goals. And while a project charter can be a useful reference throughout the lifecycle of your project – helping you re-center around your goals if you run into barriers or lose focus – you should also treat this as a living document that can be updated along the way.

Your team is encouraged to modify this template as needed to meet your needs.

**GOALS AND OBJECTIVES**

Goals and objectives are what the group wants/needs to accomplish during its time together. Effective goals are specific, measurable, challenging – but achievable, and accepted by the group.

- **Team goals:** Describe the issue that your team is addressing to ensure that everyone on the team has a sufficient understanding of it. Discuss the possibilities. What will it look like if the team is successful? List between one and three goals.

- **Individual goals:** Research shows that teams are strengthened when team members understand the individual developmental goals of other team members and can therefore support those goals. Share with one another, and then note, at least one goal that each member of the team hopes to accomplish throughout the year (e.g., archival research skills, coding, data collection and analysis, teamwork, project management).
Consider the first section of the Project Charter, **Goals and Objectives**, along with the observations you’ve already made in this session about your project:

- How might you and the team clarify the project’s goals and objectives?
- What aspects of goals and objectives may need to be clarified further?

Given the goals and objectives that are clearly important, consider the **Roles**:

- What tasks will the team need to engage in?
- What skills and knowledge will be needed in order to perform these tasks?
TOOLS & OTHER RESOURCES
project management & tools

1. Don’t start with the tool.
2. Identify what it is that you need the most help with.
3. Choose tools for what you (and the team) need and allow time for learning.
4. Don’t let the tool distract you from the project.
Tools for managing projects & teams

Available through Duke

- **MeisterTask Pro** (project management) - [https://software.duke.edu/node/456](https://software.duke.edu/node/456)
- **MindMeister** (project planning, idea generation) - [https://software.duke.edu/node/453](https://software.duke.edu/node/453)
- **Box** (file management & sharing) - [https://oit.duke.edu/what-we-do/applications/duke-box](https://oit.duke.edu/what-we-do/applications/duke-box)

Free online

- **Trello** - [https://trello.com/](https://trello.com/)
- **Asana** - [https://asana.com/](https://asana.com/)
- **Basecamp** - [https://basecamp.com/](https://basecamp.com/)
- **Zoho Projects** - [https://www.zoho.com/projects/](https://www.zoho.com/projects/)
- **Wrike** - [https://www.wrike.com](https://www.wrike.com)
Other resources

- Bass Connections project resources, https://bassconnections.duke.edu/fac-team-resources/tools-for-success

- Duke cross-divisional PM working group - curated resources - https://docs.google.com/document/d/1v6KoFcEGNipu4T-oUZtaPG5Y7yQHdK3usfOgFvt18yM/edit?usp=sharing

- *Making Things Happen: Mastering Project Management* (Scott Berkun) - http://search.library.duke.edu/search?id=DUKE003932759 (great resource for specific questions regarding handling a project in process, such as communicating effectively with the project stakeholders & team)

- Lynne Siemens’ curated materials on project management - https://github.com/curateteaching/digitalpedagogy/blob/master/keywords/projectManagement.md
Managing Stuff

Files & Processes

Jennifer Darragh
Sophia Lafferty-Hess
Research Data Management Consultants
Managing Stuff

■ **So what?**
  Why is it important to actively and consistently manage information, especially on a team?

■ **Organization**
  How might you organize information to make it easier to locate?

■ **Description**
  How might you describe information to make it easier to identify, understand, and use?

■ **Documentation**
  What are ways to document and communicate your organization and description processes, so that others can understand and follow them?
So What?
So What?
PRACTICE 1 | Defining Your Stuff

On your own, jot down the kinds of information and objects you expect to create or collect in your project. Then discuss your list with your table.

- What kinds of information and objects will your team collect or generate during the project?
- Are these all the same kinds of information / objects? How are they alike or different?
- Will individual objects stay the same over the course of the project or will they change?
- What file formats will the information be stored in?
Organization
Organization

File structure

File naming

Version control
Encapsulate all project documents under one top level folder
Include project title and date in folder name
Have a clear and consistent naming convention for your sub-structure
Document your structure
### Example: Organization (file structure)

<table>
<thead>
<tr>
<th>Name</th>
<th>Updated</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONTENT - DIGITIZATIONS (Phase 4)</td>
<td>Aug 21, 2017 by Liz</td>
<td>11 Files</td>
</tr>
<tr>
<td>CONTENT - FILE UPLOADS (Phase 4)</td>
<td>Aug 21, 2017 by Liz</td>
<td>0 Files</td>
</tr>
<tr>
<td>CONTENT - GENERAL PAGES (Phase 4)</td>
<td>Aug 21, 2017 by Liz</td>
<td>0 Files</td>
</tr>
<tr>
<td>CONTENT - IMAGES (Phase 4)</td>
<td>Oct 12, 2017 by Liz</td>
<td>5 Files</td>
</tr>
<tr>
<td>CONTENT - PHILOSOPHER TEXTS (Phase 4)</td>
<td>Aug 21, 2017 by Liz</td>
<td>0 Files</td>
</tr>
<tr>
<td>CONTENT - TEACHING PAGE TEXTS (Phase 4)</td>
<td>Aug 21, 2017 by Liz</td>
<td>0 Files</td>
</tr>
<tr>
<td>CONTENT - TRANSLATIONS (Phase 4)</td>
<td>Nov 7, 2017 by Liz</td>
<td>3 Files</td>
</tr>
</tbody>
</table>
Organization - File Names

- Be descriptive
- Be consistent
- Don’t be generic
- Appropriate length
- Don’t rely on folder structure to convey meaning
- Think critically about your file names!
Organization - File Names

- Only include letters, numbers, and underscores/dashes
- No special characters
- No spaces, instead use dashes, underscores, or camelcase (LikeThis)
- Not all systems are case sensitive. Assume this, THIS, and tHiS are the same
- For dates use YYYYMMDD

ProjectName_DocumentType_Date_Recording_Number.ext
DukeChapel_Sermon_1963-01-07_001.jpg
Organization - Version Control

Numbering: Use leading zeros for scalability

001  1
002  10
003  2
009  3
010  9
099  99
Organization - Version Control

DukeChapel_Interview_Name_v1.docx
DukeChapel_Interview_Name_v2.docx
DukeChapel_Interview_Name_v3_slh.docx
DukeChapel_Interview_Name_v4_jd.docx
DukeChapel_Interview_Name_final.docx

2018-02-22_DukeChapel_Interview_Name.docx
2018-03-15_DukeChapel_Interview_Name.docx
2018-04-01_DukeChapel_Interview_Name.docx
2018-04-26_DukeChapel_Interview_Name.docx
2018-05-02_DukeChapel_Interview_Name.docx
Organization - Version Control

DukeChapel_Interview_Name_v1.docx
DukeChapel_Interview_Name_v2.docx
DukeChapel_Interview_Name_v3_slh.docx
DukeChapel_Interview_Name_v4_jd.docx
DukeChapel_Interview_Name_final.docx

2018-02-22_DukeChapel_Interview_Name.docx
2018-03-15_DukeChapel_Interview_Name.docx
2018-04-01_DukeChapel_Interview_Name.docx
2018-04-26_DukeChapel_Interview_Name.docx
2018-05-02_DukeChapel_Interview_Name.docx
Organization - Version Control

Version History

V106  ELIZABETH - WIP RESEARCH.xlsx  current
Uploaded on Tuesday, April 10, 2018 at 7:44 AM by mattia begali.
Download  Make Current  Remove

V105  ELIZABETH - WIP RESEARCH.xlsx
Uploaded on Tuesday, April 10, 2018 at 7:16 AM by mattia begali.
Download  Make Current  Remove

V104  ELIZABETH - WIP RESEARCH.xlsx
Uploaded on Friday, March 16, 2018 at 12:10 PM by mattia begali.
Download  Make Current  Remove

Close
# Organization - File Formats

## Keep your raw files, think about your formats

<table>
<thead>
<tr>
<th>Type</th>
<th>Original Format</th>
<th>Preservation Friendly Formats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>Hand-written, docx, odt, rtf, txt, html, xml, pdf</td>
<td>pdf/a, txt, xml</td>
</tr>
<tr>
<td>Tabular (simple)</td>
<td>csv, tsv, xls(x), ods, xps</td>
<td>csv</td>
</tr>
<tr>
<td>Image</td>
<td>pdf, jpeg, tiff, png, gif, bmp</td>
<td>pdf/a, tiff, jpeg2000</td>
</tr>
</tbody>
</table>
File organization exercise

PRACTICE 2 | Organization

Using the lists you created in the first exercise, consider how your team might organize these materials and discuss what organizational strategy would help your team more easily find and use them.

- How might such information / objects be grouped or divided (e.g., in a file structure)?
- Will there be different versions or types that need to be differentiated?
- What would you want to include in a file name, in order to help you and others track these differences? (write out an example file name on your worksheet)
- What tools or platforms might you use to organize and share materials?
Description

of stuff/content
### Descriptive Metadata

Most familiar metadata fits here

Includes information that describes the digital object (i.e., title, author, date, etc.)

- Don’t forget to include identifiers
- Don’t forget to record copyright or license information

<table>
<thead>
<tr>
<th>Title</th>
<th>Our fellow Countrymen in China</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternative Title</td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>1900</td>
</tr>
<tr>
<td>Creator</td>
<td>Peetz, Friedrich Carl</td>
</tr>
<tr>
<td>Description</td>
<td>Our fellow Countrymen in China (street image from Jau-tschia-t’sun Village, approximately 1km from Qingdao) Caption in German: Unsere Landsleute in Deutsch-China (Straßenbild aus Jau-tschia-t’sun. Dorf 1 km? von Tsingtau entfernt.</td>
</tr>
<tr>
<td>Location</td>
<td></td>
</tr>
<tr>
<td>Subject</td>
<td>China—History—Boxer Rebellion, 1899-1901</td>
</tr>
<tr>
<td>Format</td>
<td>photographs</td>
</tr>
<tr>
<td></td>
<td>black-and-white photographs</td>
</tr>
<tr>
<td></td>
<td>documentary photographs</td>
</tr>
<tr>
<td></td>
<td>portraits</td>
</tr>
<tr>
<td></td>
<td>group portraits</td>
</tr>
<tr>
<td>Extent</td>
<td>5 x 6.75 in.</td>
</tr>
<tr>
<td>Digital Collection</td>
<td>Friedrich Carl Peetz Photographs</td>
</tr>
<tr>
<td>Source Collection</td>
<td>Friedrich Carl Peetz photographs</td>
</tr>
<tr>
<td>Provenance</td>
<td>The Friedrich Carl Peetz photographs were acquired by the Rubenstein Library as a purchase in 2008.</td>
</tr>
<tr>
<td>Rights</td>
<td>© Copyright Undetermined</td>
</tr>
<tr>
<td>Rights Note</td>
<td>Duke has not determined the copyright status of this item. Regardless of its status, we have made a good faith determination that online access through the Duke Digital Repository is an acceptable fair use and otherwise permitted under U.S. copyright law. For more information, see our page on copyright and citations <a href="https://library.duke.edu/rubenstein/research/citations-and-permissions">https://library.duke.edu/rubenstein/research/citations-and-permissions</a>.</td>
</tr>
<tr>
<td>Identifier</td>
<td>fcps001001026</td>
</tr>
<tr>
<td></td>
<td>ark:87924/r4w37m48x</td>
</tr>
<tr>
<td></td>
<td>duke:308229</td>
</tr>
<tr>
<td>Permalink</td>
<td><a href="https://ldn.duke.edu/ark:/87924/r4w37m48x">https://ldn.duke.edu/ark:/87924/r4w37m48x</a></td>
</tr>
</tbody>
</table>
Technical Metadata

Technical information, such as

- file format
- tool used to create
- file dimensions
- tool specifications/settings

can help with managing the file (e.g., migrating to other formats; opening or viewing; re-using)

May be recorded automatically as part of the capture / creation process
Tagging

Tagging schemes and controlled vocabularies

- Use an external source or define your own, but be consistent
- Consider the affordances of tagging tools and the ability to export tags
<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gallery - ASSOCIATED PHILOSOPHER/S</td>
<td>Gallery - ASSOCIATED TIMELINE ENTRY</td>
<td>Gallery - IMAGE TITLE (Note: should roughly agree with Timeline image caption)</td>
<td>Gallery - IMAGE SOURCE (Chicago style citation, source library, permanent record link)</td>
<td>Gallery - IMAGE PERMISSIONS</td>
<td>Gallery - IMAGE CREDIT (If applicable)</td>
</tr>
<tr>
<td>Cavendish</td>
<td>1623</td>
<td>St. John’s Abbey gate, Colchester, Essex</td>
<td>Photo by Historic England, London, United Kingdom St John’s Abbey Gate, Colchester, Essex Exterior view from the North</td>
<td>Used with permission from Historic England.</td>
<td>© Historic England</td>
</tr>
<tr>
<td>Cavendish</td>
<td>1627</td>
<td>Robert Boyle after Johann Kerseboom, c. 1689-1690</td>
<td>National Portrait Gallery, London, United Kingdom Robert Boyle after Johann Kerseboom Oil on canvas, (circa 1689-1690) 50 in. x 40 3/4 in. (1270 mm x 1035 mm) Given by Eric Bullivant in memory of his wife, Kate Bullivant, 1955 Primary Collection NPG 3930</td>
<td>This image is used under a Creative Commons Attribution Non-Commercial No-Derivatives License 3.0 from the National Portrait Gallery in London.</td>
<td>© National Portrait Gallery, London</td>
</tr>
</tbody>
</table>

EXAMPLE: Description - Spreadsheet
**EXAMPLE: Description - Data Dictionary**

<table>
<thead>
<tr>
<th><strong>aperture</strong></th>
<th><strong>Value Domain</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Version ID</strong></td>
<td>1.10</td>
</tr>
<tr>
<td><strong>Class Name</strong></td>
<td>Telescope</td>
</tr>
<tr>
<td><strong>Local Identifier</strong></td>
<td>urn:nasa.pds:context.attribute:0001.nasa_pds_1.pds.telescope.pds.aperture_1a00</td>
</tr>
<tr>
<td><strong>Steward ID</strong></td>
<td>pds</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>PDS4</td>
</tr>
<tr>
<td><strong>Namespace ID</strong></td>
<td>pds</td>
</tr>
<tr>
<td><strong>Nullable Flag</strong></td>
<td>false</td>
</tr>
<tr>
<td><strong>Submitter Name</strong></td>
<td>Submitter_PDS</td>
</tr>
<tr>
<td><strong>Definition</strong></td>
<td>The aperture attribute provides the diameter of an opening, usually circular, that limits the quantity of light that can enter an optical instrument.</td>
</tr>
<tr>
<td><strong>Registered By</strong></td>
<td>RA_0001_NASA_PDS_1</td>
</tr>
<tr>
<td><strong>Registration Authority ID</strong></td>
<td>0001_NASA_PDS_1</td>
</tr>
<tr>
<td><strong>Concept</strong></td>
<td>Number</td>
</tr>
</tbody>
</table>

**Enumeration Flag**
- False

**Value Data Type**
- ASCII_Real

**Minimum Characters**
- Unbounded

**Maximum Characters**
- Unbounded

**Minimum Value**
- 0

**Maximum Value**
- 1.7976931348623157e308

**Pattern**

**Unit Of Measure Type**
- Units_of_Length

**Conceptual Domain**
- Real

**Specified Unit ID**
- m

[https://pds.nasa.gov/tools/dd-search/](https://pds.nasa.gov/tools/dd-search/)
**CR18E**  
**CR18e. Decides: where to go on vacation?**  

<table>
<thead>
<tr>
<th>Location:</th>
<th>1731-1731 (width: 1; decimal: 0)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variable Type:</td>
<td>numeric (ISO)</td>
</tr>
<tr>
<td>Interval:</td>
<td>discrete</td>
</tr>
<tr>
<td>Range of Missing Values (M):</td>
<td>6, 8</td>
</tr>
<tr>
<td>Question:</td>
<td>Who usually makes the final decision about where to go on vacation?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Value</th>
<th>Label</th>
<th>Unweighted Frequency</th>
<th>%</th>
<th>Valid %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I always decide</td>
<td>36</td>
<td>1.8%</td>
<td>2.8%</td>
</tr>
<tr>
<td>2</td>
<td>I decide more than he/she does</td>
<td>130</td>
<td>6.4%</td>
<td>10.0%</td>
</tr>
<tr>
<td>3</td>
<td>We decide about equally</td>
<td>950</td>
<td>47.1%</td>
<td>72.8%</td>
</tr>
<tr>
<td>4</td>
<td>He/she decides more than I do</td>
<td>152</td>
<td>7.5%</td>
<td>11.6%</td>
</tr>
<tr>
<td>5</td>
<td>He/she always decides</td>
<td>37</td>
<td>1.8%</td>
<td>2.8%</td>
</tr>
<tr>
<td>6 (M)</td>
<td>Refused</td>
<td>0</td>
<td>0.0%</td>
<td>-</td>
</tr>
<tr>
<td>8 (M)</td>
<td>Don't know</td>
<td>0</td>
<td>0.0%</td>
<td>-</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Valid</th>
<th>Invalid</th>
<th>Min</th>
<th>Max</th>
<th>Mean</th>
<th>Median</th>
<th>Stdev</th>
</tr>
</thead>
<tbody>
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Documentation
(of context/workflow)
Documentatio

Guidelines, manuals, workflows, readme files

- Help ensure research is organized consistently
- Help others understand the research process

Duke University

Search Files and Folders

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<tr>
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<tr>
<td>01 User Manual - Project overview.docx</td>
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<td>02 User Manual - Research approach.docx</td>
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03 User Manual – Organization tools

Objectives

1. Become familiar with the organization tools used for Project Vox team collaboration, project management, and research tracking.
2. Understand how the different tools are used to track different types of content.
3. Set up an efficient research & tools workflow.

Again, if you find more efficient tools or workflows, that’s great! Please share with the team and make sure to document it in the new version of the manual.

Objective 1: Team collaboration – Box

The team uses an online cloud application called Box to store and version-control all the content related to the Project – everything from research notes and materials, documents, team meeting agendas and project management, to images and team information.

Why? Box works pretty much like Google Drive or Dropbox, if you are familiar with those. We use Box because it is visually better organized and because Duke has an enterprise level agreement with Box that gives our team extra storage and functionality.

Rule of thumb
If you are working on anything Project Vox related, use Box to sync and store all the information and documents. This is to ensure that nothing gets lost, and that the rest of the team can pick up where you left off, if need be.
Project: Kristin’s important chemistry project
Date: June 2013-April 2014
Description: Description of my awesome project here
Funder: Department of Energy, grant no: XXXXXX
Contact: Kristin Briney, kristin@myemail.com

ORGANIZATION
All files live in the ‘ImportantProject’ folder, with content organized into subfolders as follows:
- ‘RawData’: All raw data goes into this folder, with subfolders organized by date
- ‘AnalyzedData’: Data analysis files
- ‘PaperDrafts’: Draft of paper, including text, figures, outlines, reference library, etc.
- ‘Documentation’: Scanned copies of my written research notes and other research notes
- ‘Miscellaneous’: Other information that relates to this project

NAMING
Raw data files will be named as follows:
“YYYYMMDD_experiment_sample_ExpNum”
(ex: “20140224_UVVis_KMnO4_2.csv”)

STORAGE
All files will be stored on my computer and backed up daily to the shared department server. I will also keep a backup copy in the cloud using SpiderOak.

EXAMPLE: README
Workflow

Workflow = who does what when
Consistent, well-documented workflow can help in managing research

UNEP Film Logging Workflow
Revised 2014

Preparing for logging
1. Open “2. TEMPLATE Assessment Summary” in Google Docs (in the UNEP folder)

2. Copy and rename file before editing.
   a. Under “File” select “Make a copy”
   b. Rename the new copy file
      • replace “TEMPLATE” with name of country assessed in the report
      • delete the text “Copy of”
   c. Share with collaborators (check box)

3. Save to folder “Country Assessment Summaries”

4. Before beginning to log UNEP assessment footage for a country or region, read and identify key information from the related UNEP assessment report and enter it into the assessment summary. (All UNEP assessments can be found on the UNEP website and on the Environmental Peacebuilding website.)

Selecting film to log
1. Open “3. UNEP Film Index” in Google Docs (in the UNEP folder)

2. Identify next film to be worked on and claim it with your Net ID and date.

An excerpt from a log I kept while working a visualization of Delphic inscriptions. This entry reflects my struggles with file systems (I had to reformat to exFAT because I was working cross-platform) and preserves some code (a terminal command) I later referred to multiple times.
EXAMPLE: Commented Code

PRACTICE 3 | Documentation

Using the information / object types you worked with in the previous exercise, discuss how you will describe your content and document your process.

- What characteristics of the information / objects are most important to track?
- What tools or standards might you use for recording this information?
- What workflow or process steps will be most important to track?
- How can you make sure that everyone follows the same process for recording this information?
File Management Tools

Box
Google Drive
Dropbox
Open Science Framework
https://osf.io/

Considerations:

- Organization
- Collaboration and Sharing
- Add-Ons
- Version Control
- Storage (sensitive data?)
Looking to the future...

What one “stuff” management strategy covered today do you think will be the most important for managing an effective project?
Managing Communication

Hannah Jacobs
Digital Humanities Specialist, Wired! Lab
Co-Leader, The Other Side of Hungry River, Story+
hannah.jacobs@duke.edu | @hannahljnc
Why manage communication?

- Clarity & Focus
- Foster Good Relationships
- Sustain Momentum
- Address and Avoid Problems
Why manage communication?

Clarity & Focus

- Goals
- Roles
- Expectations
- Tasks

Write down 1 action you can take to ensure clarity & focus in communication.
Why manage communication?

Foster Good Relationships

- Trust
- Accountability
- Comradery
- Mentorship

Write down 1 activity you can use to foster good relationships.
Why manage communication?

Sustain Momentum

■ Frequent & Regular
■ Project Status
■ Planning Ahead
■ Reflection

Write down 1 practice you can implement to help your project sustain momentum.
Why manage communication?

Address and Avoid Problems

- Identify potential problems
  - Intellectual
  - Logistical
  - Technical
  - Interpersonal
- Encourage constructive debate
- Work together to solve

Write down 1 way you can encourage collaborative problem solving in your group.
With whom are we communicating?

- Project leaders
- Students
- External Partners
- Program Coordinators
- Vendors
- Project Audiences
- Friends & Family
- ...

How We Communicate

- Verbal & Written Language
- Nonverbal Communication
Nonverbal Communication

(Body Language)
66-93% of communication is nonverbal

Use body language to encourage interaction:

- eye contact
- facial expressions
- gestures & posture
- tone, pitch, and speed

**consider asking**

Verbal & Written Communication
physically ↔ virtual

face-to-face ↔ voice only ↔ text only

synchronous ↔ asynchronous

one-way ↔ multi-way

known ↔ anonymous
Tools for Managing Communication

1. Team Norms
2. Platforms & Media
Norms are a list of expected behaviors that create a set of shared values and boundaries that define a team’s culture.

“Setting Team Norms.” Duke University Bass Connections.
Activity: Establishing Team Norms - Part 1

Your group is beginning work on a project together for the first time. You are meeting for the first time. Work together to develop a list of team norms:

1. Brainstorm a list;
2. Review list & consolidate repetitive ideas;
3. Agree on a final list of 10 team norms.

Time: 5 minutes
Activity: Establishing Team Norms - Part 2

Pair up with another group. Review each other’s lists.

- How are your lists similar?
- How are they different?

Time: 5 minutes
Common Team Norms

- Let one person speak at a time
- Listen with an open mind
- Hold all team members as equals
- Explain your reasoning and intent
- Focus on interests, not positions
- Discuss difficult issues

- Test assumptions and inferences
- Embrace constructive debate and disagreement
- Keep your commitments
- Participate fully
- Seek to learn from one another
- Provide candid and constructive feedback

“Setting Team Norms.” Duke University Bass Connections.
Digital Platforms for Communication
Activity: Platform Comparison

With those at your table, review the 2 platforms you’ve been assigned. Consider:

- What are the platform’s communication dimensions?
- What are the primary use(s) of each tool?
- How can these tools help/hinder communication?
- How are these tools similar and/or different from one another?

- Physical
- Virtual
- Face-to-face
- Voice only
- Text only
- Synchronous
- Asynchronous
- One-way
- Multi-way
- Known
- Anonymous
Additional Considerations

- Choose & use platforms that your team is comfortable with.
- Take time to make sure everyone knows how to use a platform if it’s new to them.
- Make using the platform a habit.
Final Thoughts
Encore
Elements of a Meeting

- Schedule
- Start & End Times
- Agendas
  - Check-ins:
    - Roses & Thorns
    - Individual Work Updates
  - Project Goal Updates
  - New Topics
  - Issues / Problem Solving
  - Next steps / Task assignments
    - Review & adjust goals, timelines, deadlines
- Meeting notes
Managing People

including yourself

Ciara Healy
Librarian for Psychology & Neuroscience, Mathematics, and Physics
Emotion in Groups: Five Core Concerns

- Appreciation – being seen, valued and understood
- Affiliation – being included, part of things, heard
- Autonomy – being trusted and meaningful contribution
- Status – your social importance/influence in relation to others
- Role – conventional roles and temporary roles within a group, as well as how you see your own and others' roles.
Emotion & faking it

**emotional labor** (Hochschild): “the need for workers to regulate their emotions to satisfy their customers (and ultimately, their employers)... employees, particularly those in service-oriented industries, such as flight attendants, bank tellers, or restaurant wait staff, were required to smile, be polite, and act engaging toward customers (even the most brutish ones), which could lead to them to feel estranged from their own emotions.”

Faking emotions almost never works, and this is the case with intimate relationships, workplace interactions, in negotiations and in stakeholder or customer-facing situations. It takes a toll.
Express appreciation

Appreciation is about the impact appreciation has on the one who is appreciated. **Appreciation makes people feel better.** That's it.

Fisher and Shapiro claim that, "'appreciate others' can be taken as a shorthand, all purpose guide for enlisting helpful emotions in those with whom you negotiate." ([Beyond Reason](p.27) p.27) And in group work, there is a lot of negotiation going on.
Express appreciation

**Understand** each other's point of view (which doesn't amount to agreement with another’s view.)

**Seek** merit in what each one of us thinks, feels or does (one way is to imagine yourself as an impartial mediator; what beliefs and reasoning can you find behind their position?)

**Communicate** our understanding and appreciation in words and actions. When a person's thoughts, feelings or actions are overtly recognized and acknowledged, *strive to be apt, to the point, appropriate and honest* (no faking it.)
Express appreciation

The metaphor here is,

“listen for the music, not just the lyrics.”

What people say is one thing, but in the music is where you will find the unmet concern and the emotion. Pay attention to tone, body language, emphasis, meta-messages. To make sure both sides are understood, check in by asking, "what do you hear me saying?"
Build Affiliation

Affiliation is the sense of connectedness with another person or group.

If you build caring, the result can be less resistance and more openness, and the possibility of changing one’s mind. This is the work of bridging gaps.
Build Affiliation: Two Flavors

**Structural connections**
common membership in a group or other things you have in common such as what links/experiences connect you (age, family, experience, major, hometown, common interests/hobbies, etc.)

**Personal connections**
personal ties and bonds.

Talking about them reduces personal distance, but also, give people space. This kind of connection can't be forced.
Build Affiliation

Treat others as colleagues (rather than underlings) and sincerely emphasize the shared experience of your work on the project.

Some less obvious routes to building affiliation:

- let someone else do you a favor or ask for a small favor which allows them to feel generous.

- keep an eye out for exclusion and cliquishness. Examples of seemingly harmless exclusion - excluding a group member from a meeting, or even a coffee run - can have surprising emotional consequences and build resentment.
Practice .5

In preparation for a face to face, one-on-one meeting with a team member, you anticipate a strong emotional reaction from them – the student is not pulling their weight on the team, is frequently late, misses meetings and deadlines and becomes defensive when other members of the team “joke” about it. They even have a nickname among some of the team: Joecrastinator.
Practice .5

- **Q: How can you best prepare for the meeting?** Recall, the issue is not about the emotions being displayed at any particular time, rather the emotions can be a lens through which to discover the core concern.

- **Q: What do you think the team member’s core concern might be?** And how might you address this team member’s core concern with the larger group, if you decide to do so?

- **Q: In this situation, how can you use your own emotions “as a lever” to shape the conversation during the one-on-one meeting.** Strong negative emotions of your own may arise in the one-on-one meeting – what are your own emotions telling you? How can you prepare ahead of time to handle them?
Respect autonomy

Emotion can build when a colleague is not consulted, even in a trivial matter; that is, you make a decision that affects another without including them.

If a team member says something like "I wasn't informed" or "I did not agree to that." - that is, they feel offended or transgressed. You or another group member has limited their scope of autonomy and as a result, their trust has been undermined.
Respect (your) autonomy

If limiting another's autonomy is problematic, so is limiting your own autonomy. This can occur when you feel powerless to change things or do not have influence on a decision that affects you.

However, there is also power in not having authority to decide everything...

You want fries with that? What sauce? Large or medium fries? For here or to go? Would you like the curly fries, the steak fries? We also have tater tots. How many packets of ketchup?
Autonomy unpacked

YOURS
locate your power in affecting and shaping decisions, rather than imposing them
make recommendations • offer options that contribute to decisions • participate in brainstorming • develop useful ideas or refine options.
Another way of looking at it is to increase your influence on the decision making, and the outcome for participants is a mutual feeling of satisfaction. (A helpful emotion.)

OTHERS’
include those who will be affected by your decision
That is, exclusion here impinges upon their autonomy, including or especially invisible stakeholders’. It is key to focus on the process or how a decision is reached. Consulting your colleagues can have benefits. It can make people feel included or you might learn something from whomever you’ve consulted with, and you have offered them an opportunity to contribute. All helpful emotions.


**Acknowledge status**

**Status is our social standing in comparison to others.** If your status is demeaned, emotions of embarrassment, shame or frustration can arise. Not helpful!

Status is about self-esteem and the esteem with which others view us -- this is something, as social creatures, we all want. High status also has an impact on our influence in groups, where everyone wants to be heard and respected. Competing over status should be avoided (a.k.a. a pissing contest.)
Status: Two flavors

SOCIAL

PARTICULAR
Social status

- Acknowledging social status is about showing respect and regarding the importance of another person in a social hierarchy.

- Notice where people believe themselves to be socially in a group. For example, listen to how a community partner describes themselves, and listen for references to their connections to high profile people, projects, credentials, groups or experiences and their preferred mode of address.

- Status can be lent to you by virtue of your positive interactions with high status people. Listen for and notice a desire for deference. In some groups, informality may be a value, so there is a more informal vibe but that may not mean that a social hierarchy is not in place.
Particular status

- Particular status is also called high standing, and it is about individual expertise or contribution. This may be the more relevant aspect of status in your group, as there are as many areas of expertise as there are members. Notice and acknowledge a person’s particular expertise.

- Be proud and confident of your own areas of status, especially when you need a boost, and do so for others. Show mutual appreciation.

- Finally, try not to conflate social status with particular status and avoid generalizing from one expertise to another; your super creative web design person might not be the best person to order the end-of-project party snacks (raw, vegan Icelandic food - yum!)
Practice 1

Project manager and team meet and decide to create a Wordpress site to extend the reach of their project. A key member of the team is absent from the meeting – the professor on the team - upon whose book the project is based. The professor has been pretty hands-off so far, with not a lot of input into day-to-day decision making.

An undergraduate team member is assigned the work of creating the Wordpress site, using content from all of the team members, and it turns out beautifully. When presented with the product, the professor, does not think that the site is the right direction to go, and decides to jettison it, without suggesting another direction.
Practice 1

- Q: As a project manager, you’d have to break the news to the Wordpress site creator and the rest of the team, as well as move forward in a different direction. Of the 5 core concerns that Fisher and Shapiro describe, which do you think most affects the student who created the Wordpress site and why? How would you address this with the student and in what terms? That is, what can you do or say to generate helpful emotions?

- Q: As a project manager, you’d have to break the news to the Wordpress site creator and the rest of the team, as well as move forward in a different direction. Of the 5 core concerns that Fisher and Shapiro describe, what do you think most affects the professor and why? How would you address this concern with the professor, and in what terms? That is, what can you do to generate helpful emotions?

- Q: As a project manager, you’d have to break the news to the Wordpress site creator and the rest of the team, as well as move forward in a different direction. Of the 5 core concerns that Fisher and Shapiro describe, how can you use what you know about the core concerns to start the necessary reparative work within the group and move the team forward on the project? That is, what can you do to generate helpful emotions?
Questioning Role

What purpose does your role serve in a group?

Is your role meaningful to you? This is key, because, again, faking it never works.
Choose a fulfilling role

We often play a role in a group e.g. critic, problem solver, voice of reason etc. Ideally your role would be fulfilling even if it is also conventional or temporary. You already have many roles that you take on - student, friend, writer, teammate, facilitator, scholar - and these inform your behaviors and expectations.
Roles, continued

- What purpose does your role serve in a group?
- Is your role meaningful to you? This is key, because, again, faking it never works.
- Consider how to negotiate roles for yourself and other group members:
  1. **job label**: "leader of a Story+ or Bass Connections team"
  2. **activities do you actually do given that role**: e.g. "coordinating the people, pace, & outcomes in a Story+ group this summer."

- Shape your conventional role:
  - **What activities can make a role more fulfilling**: add new activities/modify current activities
  - **What activities can you delete that are unfulfilling**: someone else can do them/no one has to do them

- Choose your temporary roles carefully, e.g. class clown, guest, listener, Eeyore, informal mediator, encourager.

- See and appreciate the roles that team members have taken on. You can also facilitate a role change if needed. People can be empowered to respond to a new situation if they feel have the flexibility to take on a temporary role, as roles are connected to feelings of responsibility and the actions that go along with it.
Practice 2

During a team meeting wrap up, during the “roses and thorns” debrief activity, you notice that one of the team members is once again embracing the role of Devil’s Advocate/Critic, becoming increasingly dismissive of others’ ideas and suggestions.

In response, other team members are starting to shut down or are becoming argumentative. The meeting is about to go off the rails. How might you work with that team member during the meeting and to help them change their role(s) in future meetings?
Practice 2

- **Q:** How can you get the meeting back on track in the short-term. That is, what can you do to generate helpful emotions in the moment?

- **Q:** What tasks might you add or remove to make a temporary or conventional role like Devil’s Advocate more fulfilling for the particular team member and the team?

- **Q:** How would you approach the student about a modified or different role; either conventional or temporary? That is, what can you do to elicit more helpful emotions in The Critic?
Emotional Intelligence

- As savvy as you may become working with emotions in the workplace & in groups, you can always benefit from reflecting on your own emotions and their role in your management of all kinds of projects.

Q: First check in on your own reactions (physical and emotional) in an emotionally heightened situation or conversation.

Q: What would you say is your most salient core concern of the 5?

Q: Can you reliably tell when your own core concerns are making a difference (negative or positive) in a work/group situation?
Team member Megyn seeks you out to talk about a decision you’ve made regarding a sub-project task. Here is what she says: “I’m really sorry to ask to meet about this, but I was just so shocked when I read your email about the video project! I can’t believe you assigned it to Sanjay and Cole. I feel like the production team is not keeping me in the loop since I took time off because I was sick. It’s not fair!”
After some conversation with Megyn to identify her core concern, here is what you sum up with:

“I know this must not have been easy for you, and I appreciate your honesty. First, I want to emphasize that I did not assign you to the video project because I was concerned about your workload—not because I didn’t think you could do the work. You are already doing a great job with the project teams you are currently on—and I know they require a lot of time and effort. As for the lack of communication, I sincerely apologize. And yes, I can work with the team to make sure we do a better job keeping you informed in the future.”
Reiteration:

Emotions can be an asset! You cannot choose to have an emotion or not – you have them and ignoring them/faking it doesn’t work. Don’t deal directly with emotions/emotional expression, rather, deal with the core concerns underlying them. Strong negative emotions happen, so plan ahead and be ready. Soothe yourself and others.

- Appreciation - find merit in what others think, feel or do & show it often, genuinely.
- Affiliation – turn an adversary into a colleague. Broken social bonds = negative social emotions
- Autonomy – expand yours & do not impinge upon theirs
- Status – recognize high standing wherever deserved
- Role - choose a fulfilling role, be flexible & shape activities within the role.