

# How to Work with a Consultant on Museum Digital Projects

Presented by:

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## Rachael Cristine Woody

Rachael is the owner of Rachael Cristine Consulting, and provides services to museums, libraries, and archives.

She specializes in museum collections management systems, digitization technology, digital project management, and digital usership. During the course of her career she has successfully launched multiple digital projects that include advanced digitization technology, collaborative portals, and the migration of collection information into collections management systems.

She is also a popular guest author for Lucidea's *Think Clearly Blog*.

## What We'll Cover:

- An introduction to museum digital projects
- A review of museum digital project elements
- Museum digital project types where a consultant can help
  - [Assessing digital collections and making recommendations](#)
  - [Creating a digital project framework](#)
  - [Providing project management for a museum digital project](#)
  - [Selecting and implementing a museum Collections Management System \(CMS\)](#)
  - [Delivering digital collections training to museum staff](#)
- When to consider a consultant
- Resources
- Additional Reading





## An Introduction to Museum Digital Projects

- Museum digital projects are projects that contain at least one digital element. The purpose for these projects can be a mixture of preservation and access, and even if there are some non-digital tasks included, overall it is considered a digital project.

# Museum Digital Project Elements

## Digital elements can be:

- Digitization
- Working with digital files
- Cataloging in a CMS
- Publishing digital content online
- The composition of museum digital projects can vary greatly. With this variability in mind, this series will highlight several digital project types where working with a museum consultant can be beneficial.





## Museum Digital Project Types Where a Consultant Can Help

- Assessing digital collections and making recommendations
- Creating a digital project framework
- Providing project management for a museum digital project
- Selecting and implementing a museum Collections Management System (CMS)
- Delivering digital collections training to museum staff

## Consultant Service: Assessing and Delivering Recommendations

One of the natural places to begin work with digital collections is to ascertain:

1. The state of the digital collections;
2. The challenges and opportunities present;
3. The museum staff's goals for the digital collections;  
*and*
4. The resources needed versus the resources available.





## Consultant Service: Assessing and Delivering Recommendations – Examples

Here are a few examples of what a museum consultant can assess and offer recommendations on:

- Digital collection holdings specific to collecting mission
- Digital collection policies
- Digital collection workflows
- Digital collection acquisition process and tools
- Digital collection transfer and storage
- Digital file preservation
- Digital file management

## Consultant Service: Assessing and Delivering Recommendations – Benefits

### A consultant can:

- More easily see the bigger picture.
- Ask unanticipated questions.
- Put forth an assessment and recommendations without situational bias.
- Command more attention and sometimes more respect from museum leadership.



## Consultant Service: Assessing and Delivering Recommendations – Benefits, continued.

### A consultant can:

- Offer information on the latest tools and museum trends
- Help you make your case to the board, donors, or granting agencies as to why the next digital project should be prioritized and funded

**TIP:** This type of externally-generated (by the consultant) documentation helps demonstrate you've done your homework and can be fairly persuasive.

# Consultant Service: Creating a Digital Project Framework

Every digital project needs a solid digital project framework. Components of a framework include:

- A clearly defined end goal;
- Milestones to hit on the way to end goal;
- A timeline that tracks activities and tasks that all add up to the achievement of the end goal;
- A plan from how to get from start to finish;
- Identification of roles and personnel assigned to roles;
- An outline of challenges and opportunities; and
- A list of resources needed (people, knowledge, time, money, and tools)





## Consultant Service: Creating a Digital Project Framework – Benefits

### A consultant can:

- Use project management expertise to breakdown projects to fit into a digital project framework.
- Offer insight and lessons-learned regarding digital project framework, strategies, timelines, needs, and outcomes.
- Create a project roadmap to lead them through the project from start to finish.

# Consultant Service: Providing Project Management

**A project management consultant can lead and support all aspects of project management, including:**

- Utilizing a project management platform to run the project tasks and deliverables.
- Breaking out activities, tasks, and subtasks with staff assignments to each.
- Creating, tracking, and centrally storing all project instructions and documentation.
- Establishing estimated timelines and tracking actual time.
- Making adjustments to the project activities and tasks as challenges and opportunities arise.
- Running regularly scheduled check-in meetings to discuss project blockers, ascertain project status, and track project progress.
- Tracking tasks and people to ensure everything is running on smoothly.
- Addressing any issues that arise by reallocating resources and/or adjusting the project timeline and/or deliverables.
- Providing regular updates to project stakeholders.





## Consultant Service: Providing Project Management – Benefits

### A consultant can:

- Bring both project creation and project management together to provide a cohesive experience.
- A gap in museum staff, particularly where project management is concerned.
- Bring a wealth of digital project experience to your museum.

# Consultant Service: Selecting and Implementing a Museum CMS

When working with a consultant, selection and/or implementation of a museum CMS can include all or some of the following activities:

- Conducting a CMS needs assessment
- Drafting a specification outline
- Generating a Request for Proposal (RFP)
- Researching CMS vendors and holding information calls to ascertain fit
- Arranging vendor demonstrations
- Providing a staff scoring rubric
- Delivering a product recommendation
- Supporting contract negotiation and execution
- Supporting or executing CMS functionality enablement and/or customization
- Assisting or leading data migration from one CMS to another
- Assisting in testing and trouble-shooting





## Consultant Service: Selecting and Implementing a Museum CMS – Benefits

### A consultant can:

- Help save staff time (and stress) on the process, learning a new product, and implementing the CMS.
- Short-cut the process to find the best fit because they're familiar with the latest CMS vendors, platforms, and functionality.
- More effectively recommend the most applicable CMS products to museum staff for consideration.
- Can confidently answer the “What if?” factor, as in: What if there's a better CMS product out there?

# Consultant Service: Delivering Digital Collections Training to Staff

In instances where museum staff may have little or no experience with a particular digital project process, tool (equipment), or product (software); bringing in a consultant is a necessity. Here are a few example areas where a consultant training session can be of benefit to staff, volunteers, and interns:

- Learning the process and best practices for digitization
- Learning the process and best practices for file management and preservation
- Learning the process and best practices for object data capture via spreadsheet
- Learning the process and best practices for cataloging within a CMS
- Learning the process and best practices for how to use any given CMS product



## Consultant Service: Delivering Digital Collections Training to Staff – Benefits

### A consultant can:

- Create any process flows, templates, and instruction guides the museum needs for effective training.
- Provide further detail and examples so that the instructions are effective.
- Build a training course for staff that leads them through the documentation and allows them to engage with the content and the consultant in real-time.
- Record and make trainings available for staff to use and reference throughout the duration of the project.

## When to Consider a Museum Consultant

**Your museum should consider working with a consultant if any of the following are true:**

- The expertise needed isn't presently available on staff.
- The staff don't have enough time (capacity) to take on the specific activity or project.
- The project has never been done before.
- The project is highly specialized or contains areas of work that are highly specialized and need outside expertise.





## Resources:

For an example of consultant services, I invite you to check out my website: <https://rachaelcristine.com>

You can find consultants via professional organizations such as:

- The Association of Registrars and Collections Specialist, OnContract: <https://www.arcsinfo.org/opportunities/on-contract>
- The National Council on Public History, Consultant Directory: <https://ncph.org/consultant-directory/>
- The Society of American Archivists, Directory of Archival Consultants: <https://www2.archivists.org/consultants>

# Additional Reading via Lucidea's Think Clearly Blog:

- A Thoughtful Approach to Museum Digital Project Creation
- Create a Museum Digital Project Workflow that Works (Parts 1-3)
- How to Build Sustainability into Museum Digital Projects
- How to Establish Museum Digital Project Core Areas
- The Importance of Sustainable Museum Cataloging & How to Achieve It
- Museum Digital Project Consultant: Assess and Recommend
- Museum Digital Project Consultant: Create the Project Framework
- Museum Digital Project Consultant: Project Management
- Museum Digital Project Consultant: Collections Management System Selection and Implementation
- Museum Digital Project Consultant: Training
- What to Do When It's Your First Museum Digitization Project





## Conclusion

- An introduction to museum digital projects
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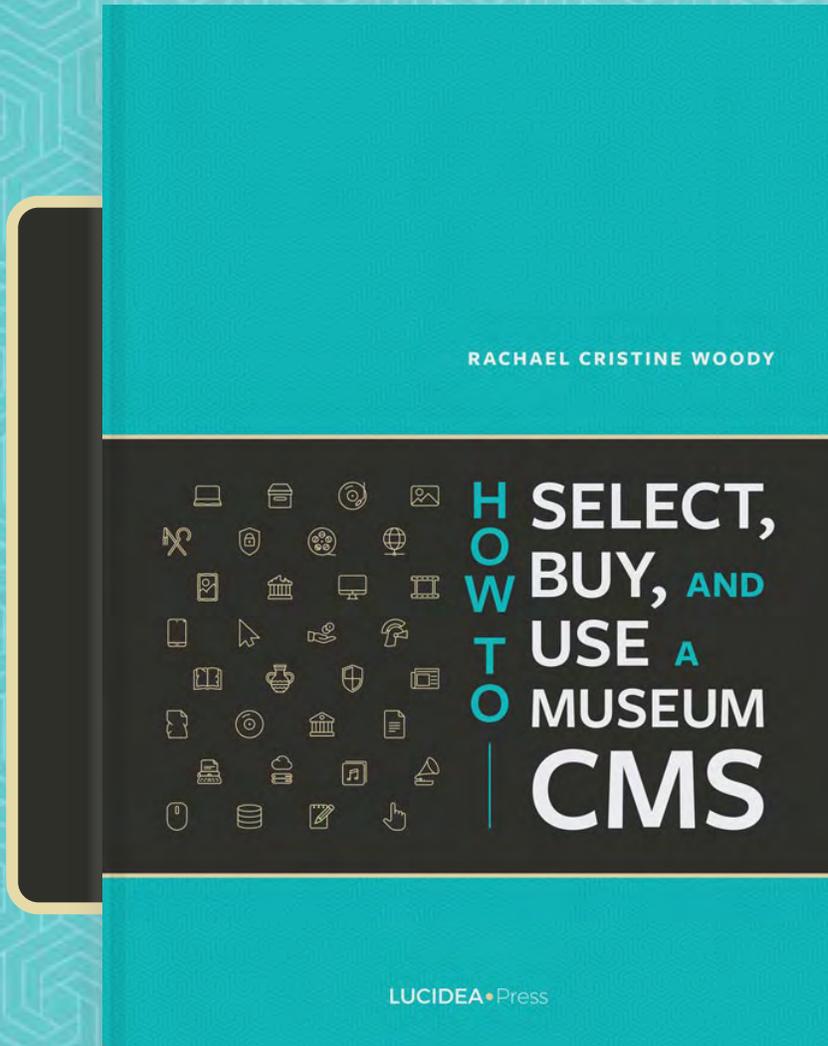
## Grants Workbook & Template

- Grant application information
- Grant project information
- Four (4) project templates:
  - Digitization
  - Collections Management System
  - Collections Assessment
  - Disaster Planning

Get your copy at  
<https://lucidea.com/grants-workbook-and-templates>



Authored by Rachael Woody in collaboration with  
Lucidea.



# How to Select, Buy, and Use a Museum CMS

Get your copy at [lucidea.com/museum-cms-ebook/](https://lucidea.com/museum-cms-ebook/)

Have more questions?  
Need more information?

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# Thank You!

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