



INTAKE QUESTIONNAIRE for New Digital Projects

Staff in libraries, IT departments and digital humanities centers often need to know how to guide faculty undertaking new digital projects. Quickly determining the needs of the project and of the faculty member is the first critical step in making sure that there are clear understandings on both sides about what the project will entail, now and into the future, and who is willing to take on what sorts of responsibilities so that the project remains valuable over time.

The following questions are intended to guide staff in libraries and IT units when speaking to potential project leaders, by encouraging those scholars to think systematically about the goals they are setting for their projects, the activities that will be needed to achieve those goals, and the money, time, and effort they are able or willing to commit to those projects.

The Ithaka S+R Framework for Post-Grant Sustainability Planning (http://sr.ithaka.org/sites/default/files/files/Framework_20130718.pdf) is a useful worksheet that can be used to accompany this intake questionnaire.

1. Describe the project

- What is the name of the project?
- How and for how long is the project currently funded?

2. Articulate the impact goal

In answering the question of what a project aims to achieve, goals are often framed around what the project leader desires to do—the resource he wants to create, the workshop he wants to conduct, and so forth. But here, encourage the project leader to frame the impact of the work in terms of its impact on its users. An impact goal should be ambitious, but specific and measurable.

- What impact do you want your project to have?
- How will this project help people?
- What will your project enable them to do?
- Other aspects of the resource?

3. Set sustainability goals

Once the project's impact goal is clear, you can start to sort out what is required in order to meet that impact goal, by establishing targets that are as specific and measurable as possible. The impact you aim to have will inform the set of activities you will need to undertake in order to reach that goal, and the activities will dictate the level of monetary and nonmonetary support needed to sustain the faculty member's project.

What needs to happen post-grant (or post-launch) in order to achieve this impact goal? To achieve your desired impact, what must be sustained?

- The underlying hardware or infrastructure?
- The content that populates the resource?
- The channels that lead users to the resource?
- The attention of the users themselves?
- The project staff?
- Other aspects of the resource?

These sustainability goals should be very specific. It is a good first step to acknowledge that it will be necessary to “regularly update content,” but at this stage, we strongly suggest pinning down measurable goals as much as possible. Will you need to have one new article per week or several thousand per year?

4. Identify activities

Once it is clear what the project will require post-launch—i.e., what the sustainability goals are in light of the desired impact—the next step is to identify the activities that will need to be undertaken in order to accomplish those goals and make a best effort to achieve that impact. Here, the sustainability goals are translated into the actual activities and jobs that people will do. If “updating content” is a requirement, then activities will need to include editorial work.

What activities will be needed to achieve this impact goal?

- Upgrading hardware or software? (when? how often?)
- Adding new content? (how much? how often?)
- Investment in access and discovery

- Promotion and outreach?
- Project management?
- Other activities?

5. Determine costs

Based on the set of ongoing activities the project leader thinks will be required in order to keep his resource current and valuable to users, start to assign cost estimates. Remember to factor in intentions for ongoing growth and development, including investments in new technology, content, and staff.

What resources will be required to support these activities and new resources?

- How will each of the activities noted above be paid for? Which might be provided by your institution (i.e., in-kind)? Which might come from a partner? Which will have to be paid for directly?

6. Consider sources of support (financial and non-financial)

How does the project leader anticipate securing these forms of support? Which are reliable for the long-term, and which are less so? What other options for support might there be?

Where will the project obtain the resource needed to cover its costs?

- Which activities can be best executed by others, such as a library or an IT partner? are there letters of support or other forms of assurance that this support is forthcoming? Over what time-frame?
- Which activities must be funded directly?
- What are some possible ways you might obtain the additional funding you will need?