Digital Humanities Best Practices: Engaging a Collaborator

Before Collaboration:

Scope of Project:
- What do you want to achieve (scope)? Have initial conversations to identify a best route to achieve your goal(s). What can your project reasonably accomplish?
  - Ask ‘what are the benchmarks/objectives of achievement/impact?’ rather than ‘what do want to build, exactly?’ Keep these benchmarks in mind when in discussion with your team/collaborator.
  - Which aspects of the project are absolutely necessary for satisfactory project? Which are secondary and negotiable?
- What expertise is needed for the project? What individuals/institutions have that expertise?
  - Are potential collaborators interested (as well as capable)?
  - Can certain experts be consulted for advice (periodically, or in planning stage) rather than brought on as fully-engaged project collaborators?
- How do each of these questions apply to the individual collaborators (people)? How do they apply to the collaboration (project)?
  ➜ Resource: Bethany Nowviskie’s “Ten Rules for Humanities Scholars New to Project Management”

Consider a Written Agreement:
- Is the team/person you are working with a:
  - Collaborator (co-creator; everyone has equal say)
  - Commission relationship (the overall vision belongs to some but others are trusted to envision aspects of the project for pay)
  - Contract (hired professional to execute a specific vision)
- Will team members be asked to sign a contract or charter?
  - Charter - outlines work ethics and ethos, guidelines to follow, desired attitudes (can be appropriate in inter-departmental or inter-institutional work)
  - Contract - can assume hierarchy of power, financial remuneration, deliverables (can be appropriate for outsourced / hired work)
- Will contents of your written agreement differ based on charter or contract model? Is a hybrid appropriate?
- Does a legal resource exist at your university or institution that you can draw upon for support or that can provide standard contract language?

With Your Collaborator: Discuss, Agree, and Put in Writing:

Authorship:
- How will authors / collaborators be credited for their work? Would instituting a collaborative review process for authorship be beneficial?
• What amount of work constitutes authorship or collaboration?
• Do credits reflect or imply a hierarchy?
  o If hierarchy isn’t desired, how can it be challenged?
  o How can student collaborators be reassured that their contributions will continue to be acknowledged as the project lives on/changes in publications or conference presentations?
• Can parameters for recognition be worked out in advance? Do they need to be ascertained / revisited at the project’s end?
• Who will speak for the project at conferences or departmental meetings?

→ Resources: Collaborators’ Bill of Rights
  UCLA’s A Student Collaborator’s Bill of Rights
  Elijah Meeks’ “How Collaboration Works and How It Can Fail”

Output / Deliverables Expectations:
• How is scope of work defined?
• As the group works toward achieving its goals, what are the team’s expectations for flexibility toward altering the project’s course? (Expect change!)
• Could an “If-Then” document help think through favorable outcomes in a variety of possible scenarios?
• What products are being disseminated?
  o Can they be published under creative commons?
  o Can they be built using open-source software?
• What resources does each author need, based on that author’s role in the project?
  o Do authors already have the required skills? If not, what do they need to learn?

Project Management Basics:
• Who will be project manager?
• What is the timeframe for project completion?
  o How will progress be tracked, reported, and communicated?
  o Would project management software be useful? (e.g., Basecamp, Wrike, Asana)
  o What scheduled meetings and deadlines can be foreseen upfront and added to a chronologically-organized, shared timeline or calendar?
• What are the project’s associated costs?
  o Can the costs of each aspect of the project be broken down (in terms of time or financial resources?)
  o How and when are payments communicated or delivered?
• How will the group make decisions? (designated point-person(s), group vote)
• How might potential conflicts be resolved?
  o Could a designated external point-person act as arbitrator?
  o How will the team compensate for or divide up “lost” work due to a departed team member or missed deadline?

→ Resources: Sharon M. Leon’s “Project Management for Humanists”
  Tom Scheinfeldt’s “Intro to Project Planning and Management”

Communication Expectations:
• How can the team maintain open, transparent, frequent communication?
  o What is a reasonable response time?
  o What does “frequent communication” mean for your team?
What means of communication suit the team?
- How can digital communication tools be leveraged without overwhelming/inundating project participants? (blogs, wikis, email, listservs, shared digital spaces, instant messaging, websites)
- Can person-to-person meetings facilitate rapport or enable the group to grapple with especially thorny issues? (in person, on the phone, via Skype?)
- If communication records will be kept, how and where?
- Will all team members be included in all meetings/on all correspondence? (balance between inclusivity and information overload)
- How often, when, and where will meetings take place? (only have a meeting if you need to; face-to-face meetings can be crucial; review literature on how to run a meeting since strategies like “let’s sideline this for now” can be very useful)

Speaking the Same Language:
- If team members come from different disciplines, how will you understand each other?
- Will you codify a common language, or would doing so collapse nuance and erase expertise? Where is this language made explicit?
- Could communicating via diagrams, mock-ups, or annotated images help avoid misunderstandings?
- Could a “translator” help bridge the gap between expert vocabularies?

Data
- Who is providing the project’s data?
- When will data be disseminated? In what form?
- What does the data consist of?

Project Maintenance, Longevity, and Ownership:
- Do collaborators agree on the project’s access and openness (whether via Creative Commons licensing, institutional repositories, or other options)?
- Who has physical responsibility or ownership of the project once it is completed?
  - Different collaborators might own different parts
  - Could licenses help determine one party’s right to use the other’s assets created before the engagement began (in the case of code or proprietary technologies, for example)?
- Who owns assets created in support of the project?
  - Even if one party doesn’t “own” an aspect of the project, can they “use” it in the future? How? Would either party benefit from portfolio rights?
  - For a contracted project, does copyright need to be contractually asserted prior to the engagement? If so, will the commissioning party hold full copyright?
- Who manages project data?
- What will happen to the project after completion?
  - Who will fund stewardship of the project after its completion?
  - Whose servers will host it?
  - Who is responsible for maintenance?
  - Who is responsible for storing data created in support of the project?
  - What archive or repository might hold an additional copy?

Resources: Info on licensing code:
- Choosing An OSS License
- Creative Commons Licenses
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