“Investing in Organization: Tips, Tools, and Benefits”, Alston Cobourn, South Carolina Archival Association annual conference, November 4, 2024

Slide 1- Intro

Hi everyone. Thanks for having me. I’m Alston Cobourn, Head of University History and Records at East Carolina University, which is comprised of University Archives and Records Management. Over the past year, our department has been working smarter, not harder, through increased organization. On the whole, archives and records professionals are overworked, which can make even the task of staying organized overwhelming. My goal is for you to leave here energized with some concrete ideas you could consider implementing in your own work life.

Slide 2- Tips

Here are some things I’ve found helpful in managing my own work and my department during the last year

- Planning ahead- At the beginning of the semester we spent a couple days planning our student worker projects, prioritizing them, thinking about which tasks were best suited to which students, writing out all the instructions, getting the projects prepped.
- And we did the same thing with audiovisual digitization projects. We have a goal to digitize all of the AV we want to digitize asap because of the rate of decay of the media and because outsourcing is going to become harder over time as working equipment becomes more scarce. So last year we prioritized the order of the AV projects and wrote out all the instructions, steps, details for each so that we would be able to just roll from one to the next more smoothly.
- We will continue to have planning sessions at the beginning and end of every semester and summer.
- Calendaring- I reserved time in advance on our calendars throughout the whole semester for specific projects to ensure we would be able to find time to work on them as a way to keep ourselves on track and ensure that tasks don't sneak up on us at the last minute. And as soon as we get assigned a new project or task, I go to our calendars and schedule out dedicated times to work on it. I have found this more helpful than just having the project deadline itself on my calendar.
- Meeting minutes- Make sure you take departmental meeting minutes. That may sound obvious, but I mention it because I think particularly for small departments it can be easy to think it isn’t necessary. There are only 4 of us in my department, so we didn’t always take meeting minutes. We’ve found that even rough minutes help us be more productive because they help us make sure that action items decided on in the meeting actually make it into our productivity tools

- We keep an annual goals document which lists both our annual department goals and each staff member's annual goals. When we finish a project or task, I go ahead and record that progress in our goals document because that allows me to see the work we've done in the larger context and make sure we are where we need to be in making progress towards the goals for which we are going to be held accountable because there are a lot of other tasks that come up during the year and must be done that do not necessarily relate directly to our official goals. Adding progress notes to the Goals document also makes it easier to write the annual report when that time comes.
- My university offers a free 3 hour online project management course, which I carved out the time to take and am really glad I did. Chances are good that your campus may offer something similar through your IT department or online training platform. Learning project management basics allowed me to select and apply aspects that seemed particularly useful to the kinds of projects my team works on. Aspects that seem particularly relevant are
    - holding project kickoff meetings and post-project debriefs,
    - tracking project progress in different, more visual ways,
    - spreading extra time throughout projects instead of just at their ends,
    - engaging in risk assessment and mitigation,
    - establishing team norms,
    - and holding a weekly Scrum-style standup meeting to review progress and identify barriers.

Slide 3- Tools

- I want to talk about some tools that we've found particularly helpful.
- ECU is a microsoft school that a few years back started pushing Microsoft Teams really heavily and it is now the library's primary internal storage location. So we've embraced that and have decided it is better for collaboration on documents than our networked shared drive, which was intended to be the primary internal storage location previously.
- We decided to try out using the Tasks function within the Planner App in Microsoft Teams to track our current and future projects. And we decided it was really helpful. It allows us to categorize projects, set deadlines, reorder projects, define project steps, and assign tasks to team members. It emails us reminders as deadlines approach.
- And it is a single place that all team members can easily access and edit and that really has enabled us to all get on and stay on the same page.
- And because we are already in Teams everyday anyway to access files we are working on, Tasks is also right there in our faces, so there is no risk of out of sight, out of mind. It is convenient to use and that makes a huge difference in its effectiveness.

- We have also streamlined communication about records management by routing all related email through a single departmental email account instead of through our individual email accounts. We updated our website and our educational materials so that they only point to that one email account.
- As I mentioned in the previous slide, we've been utilizing our calendars in a different way by booking out work sessions for specific project tasks months in advance. In our particular case this is Microsoft Outlook. Those of you who work at universities, like us, do not have a choice in which email client you have to use, but I'd say it's important to make peace with whichever client you have and figure out which features of its calendar can help you.

Slide 4- Tasks screenshot

This is a screenshot of the Tasks application in Microsoft Teams for those of you who haven't seen it. It is a lot like a Trello board. I wanted to point out a few things.

We have categories of tasks.

Under some individual tasks you can see we have sub-tasks lists

You can assign Due dates to tasks

You can assign members of your team to specific tasks

You can drag tasks around to re-prioritize

You can look at the tasks in different views, this is just the one I like best, its called board view. There's also a grid view, and a schedule view that utilizes the due dates you've assigned

Slide 5- Benefits

Our decision to invest in increasing our organization has yielded multiple benefits.

- Pre-planning student projects and digitization projects has created smoother transitions between them which results in decreased stress, particularly in managing the student workers. We are better able to keep our students busy with meaningful work because we avoid the situation where a student finishes something faster than we anticipated and we then have to scramble to get them started on a new task in the middle of our busy day or week at an inconvenient time.
- The smoother transitions also result in less wasted time between finishing one project and starting another
- It also results in fewer mistakes to be corrected or tasks to be redone differently because we have a solid, well thought out plan from the start
- Decreased general confusion, increased sense of calm in the department
- We are able to get more done. We have an increased ability to meet more of our annual goals and have fewer half done projects hanging over into the next year.

Slide 6- lessons learned

- I've talked about some specific lessons learned, but I'd like to say a little about a few broader ones. In regard to tools, more is usually not better, in fact, at some point it definitely becomes worse. Another way to say that is it's important not to use too many or they won't get used in the way and/or to the extent you'd hoped and therefore won't be effective.
- You really just need the tools that are right for you and your team. A few months ago I sat down and migrated notes, lists, project plans, etc from my old Evernote account and our dept's networked shared drive into Microsoft Teams and Microsoft Tasks because that data had become siloed as those tools, Evernote and the shared drive, no longer met all of our needs. So it was time to consolidate and decommission.
- Relatedly, out of sight, out of mind really is a thing. And it applies to productivity tools. And the more tools you are trying to use, the more likely you are to have them become another thing that is out of sight and therefore out of mind. This is why productivity tools built into systems you are already using are definitely at least worth investigating.
- The tools you use will inevitably need to change over time. Your team's needs will change, the tools you use will themselves change, and not always in ways that help you, and new tools will be created. At some point you will need to re-evaluate which tools are right for you.

Slide 7- Contact info

Here's my contact information. I'm happy to take questions and comments. I also wanted to pose a few questions to you with the goal being that we can take this time to discuss with me things I presented on but also to discuss with each other your tips and tricks and pain points.

Slide 8- Questions for You

1. What helps you stay organized?

It could be a tool, routine, or something else.

2. What challenges do you face in staying organized?
3. Are there other tips or tricks that have helped you manage your own or your staff's work more effectively?