Memorandums of Understanding Workshop

Creating a Process for Successful Digital Collaboration

TDL: Texas Conference on Digital Libraries
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About Us

Rafia Mirza  Digital Humanities Librarian
@LibrarianRafia  |  rafia@uta.edu

Peace Ossom Williamson  Research Data Librarian
@123POW  |  peace@uta.edu

Brett D. Currier  Director of Scholarly Communications
@BrettDCurrier  |  brett.currier@uta.edu
If you don’t have time to plan, you don’t have time to do.
Origin

SPEC Kit 326: Digital Humanities (November 2011)

This SPEC Kit provides a snapshot of research library experiences with digital scholarship centers or services that support the humanities (e.g., history, art, music, film, literature, philosophy, religion, etc.) and the benefits and challenges of hosting them. The survey asked ARL libraries about the organization of these services, how they are staffed and funded, what services they offer and to whom, what technical infrastructure is provided, whether the library manages or archives the digital resources produced, and how services are assessed, among other questions.

This survey revealed that library-based support for the digital humanities is offered predominantly on an ad hoc basis. However, as demand for services supporting the digital humanities has grown, libraries have begun to re-evaluate their provisional service and staffing models. Many
National Theme

Traditionally, librarians engaged in transactional service.

Many of us are beginning to engage in collaborative work.
External partners may have

- Expectations that are higher than possible
- Expectations that technology does not allow
- Expectations that do not coincide with strategic priorities
- Expectations that are unfair
Librarians tend to have

• Inclinations toward saying “Yes”
• Inclinations toward gold plating
• Inclinations toward not expecting shared credit
• Inclinations toward providing seamless (invisible) service
MOU Workbook

#utamou
bit.ly/utamou
Workbook Contents

• Introduction

MOU Documents
• Workflow & Instructions
• General Template & Instructions
• Estimate of Institutional Support & Instructions

MOUs for Standardized Projects
• Systematic Reviews
• Open Access eJournal Hosting & Publishing
Workflow

Phase I: Consult
- Project is proposed
  - Initial Consultation with External Partner(s)
  - Consult with Library Stakeholders
  - Determine if Project Will Move Forward
  - Document This Decision

Phase II: Write
- Begin MOU Document
  - Negotiate Terms with External Partner(s)
  - Negotiate Terms with Library Stakeholders
  - Communicate Resource Needs with Dept Heads
  - Review and Revise MOU with all Project Members

  Tasks for other staff
  - Report limitations to EP(s)
  - Communicate Major Revisions to EP(s) Before Progressing

Phase III: Review
- Review MOU w/ Dept Heads
  - MOU Review
  - Director or AD Reviews MOU
  - Finalize Negotiations and MOU with EP(s)
  - EP(s) and Director or AD signs MOU

  Review modified MOU with additions requested by EP(s)

Phase IV: Production
- Begin the Project
  - If Modifications are Needed, Revise MOU by Adding Addenda
  - Complete Project
  - Assess Project, Document Lessons Learned, and Estimate of Institutional Support

Complete Documentation*

*Begin new MOU for the next phase if it is a multi-phase project
Template Contents

Basic Building Blocks
• Purpose and Scope
• Definitions
• Background
• External Funding statement
• Parties’ Responsibilities
• Ownership statement
• Signature and Date

Optional Additions
• Technology Limitations
• Project Continuation Plans
• Any Contingencies
• Mutually Agreed Upon Workflows
• Archiving and Preservation Plans
• Anything else
Template Contents

Addenda

• Collaborator’s Bill of Rights
• Project Recommendations
• Upfront Costs
• Estimate of Institutional Support
• Others
## Estimate of Institutional Support

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**Total**

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MEMORANDUM of UNDERSTANDING

workbook

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