

CAPSTONE PROJECT CHARTER

This is a living document that you will update throughout the 2023-24 academic year.

There are comments in the marginalia and additional slides [in this folder](#). We invite you to add any slides that are helpful to your work and learning.



The star icon  indicates sections that are required for the **Conceptual Project Charter** assignment due on **12/10/23**.

CAPSTONE PROJECT CHARTER



Cataloging Community Stakeholders

The “Cataloging Community Stakeholders” project will create a tool for the Whatcom County Library System staff to catalog and track information on significant relationships they have developed with key community stakeholders in Whatcom County.

Madeline Schroeder

CAPSTONE PROJECT CHARTER



Team Information



Madeline Schroeder

mschro2@uw.edu

Madeline is the Project Manager, and is responsible for working with WCLS staff to create a digital infrastructure to house the “Cataloging Community Stakeholders” information. She will also help create a controlled vocabulary and cataloging method for staff to organize their data, and will offer recommendations for the maintenance of this resource.

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Sponsor Information



Michael Cox, Deputy Director of the Whatcom County Library System
michael.cox@wcls.org
<https://www.wcls.org/>



Sponsor's Role

Michael will act as the liaison between Mady and WCLS. As the Deputy Director of the library and head of Community Engagement, Michael will also provide support and information about the best way to integrate the cataloging tool into the existing workflow of the WCLS staff.

Time Commitment

Michael and WCLS will need to spend about an hour per week checking in with Mady, reviewing and reflecting on the progress of the project. At certain times, this time commitment may increase if there are meetings that Mady needs to attend as part of the project.

Communication

Mady and Michael will check in weekly or as needed, and may meet outside of these weekly check-ins to connect with WCLS leadership or staff.

Michael and Mady will primarily use email to communicate, and will also use Microsoft Teams to hold meetings. Occasionally, Mady may meet with the WCLS team in-person in Bellingham if she's able to.

There is no preferred day of the week for project updates.

In the case that Michael is unavailable, a WCLS Branch Manager will support Mady in completing the project.

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Project Background

The “Cataloging Community Stakeholders” project will create a tool for WCLS staff to catalog and track information on significant relationships they have developed with key community stakeholders in Whatcom County.

The project team has envisioned this tool as a virtual “Rolodex” where staff members can input and locate contact information for community stakeholders, as well as basic information about the organizations, areas of expertise, or topics that they represent.

In its end state, the “Cataloging Community Stakeholders” project will deliver a tool or repository with the infrastructure for WCLS staff to input information about their key community stakeholder relationships. Reaching this goal will include developing the following:

- A controlled vocabulary or taxonomy to allow WCLS staff to catalog information in subject groups that align with library operations, philosophies, and user groups.
- An appropriate “container” or digital infrastructure to house the tool that is easy for WCLS to use and update
- Recommendations or prompts to support WCLS staff in capturing information about community stakeholders

The long term vision of the “Cataloging Community Stakeholders” project is to provide WCLS with an easy-to-use, accessible tool for tracking relationships with key community stakeholders who support library operations and Whatcom county residents. The relationships built between library staff and these community stakeholders are a cornerstone of library outreach and engagement. “Cataloging Community Stakeholders” will support this work by making it easier for library staff to access information about these stakeholders across the library system.

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Objectives

- Determine a “container” to house catalog
 - Mady and Michael will talk with WCLS staff to determine what the best vessel is for housing the catalog, whether this in an Excel Sheet, website mock-up, or some other “container”
- Create a controlled vocabulary
 - For staff to easily organize their community stakeholder information, Mady will create a controlled vocabulary of terms relevant to the library’s internal operations, user groups, and programs
- Provide “prompts” for information entry
 - To help WCLS staff think about how to use the cataloging tool, Mady will develop a set of questions or “prompts” for WCLS to use when contributing information about their community stakeholders



Key Deliverables

- “Cataloging Community Stakeholders” basic infrastructure. This may look like an Excel spreadsheet, a website mock-up, or another digital space for housing information.
- Controlled Vocabulary list
- Information Entry “Prompts”



Please indicate if the sponsor has reviewed project deliverables:

✓ **Yes, the sponsor has reviewed and approved the project deliverables outlined above.**

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Evaluation

Since this project is meant to provide the basic infrastructure for WCLS staff to catalog library relationships with community partners, the primary measure of its effectiveness will be whether or not staff use and maintain this tool long-term. Special consideration is being taken by Mady and Michael to ensure that the tool is as easy to use and sustainable for the library to maintain as possible to support this long-term goal.

In the short-term, Michael and the WCLS team will evaluate whether the project is successful based on the key deliverables outlined in the previous slide. Mady has conducted a Design Session with WCLS Branch Managers to gather input on the needs of WCLS staff in regards to the Cataloging tool, and will continue to use this feedback as a guide to short-term goals.

To reiterate, short-term goals will include a digital infrastructure for housing information, such as a searchable Excel spreadsheet; a list of controlled vocabulary terms for WCLS to classify information; and a list of prompts for WCLS staff to use when gathering information from community stakeholders.

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Initial Work Plan

Completed 2	In progress (Quarter 2) 7	Upcoming (Quarter 3) 5
Quarter 1 Review 14	Quarter 2 Review (Goals)	Quarter 3 Review (Goals)
Design Clinic with WCLS Branch Managers	Decide on digital platform for database	Complete project deliverables by first week of May
Determine project deliverables	Create digital platform infrastructure	Capstone reflection
+	Begin controlled vocabulary list	Gala presentation
	Begin interview prompts	Test cataloging tool with WCLS staff
	Determine due dates for project deliverables (by the first week of May)	Draft a plan for WCLS staff to implement and maintain cataloging tool
	February Status Report- Due February 11th	+
	March Video Status Report - Due March 10th	
	+	

Please indicate if the sponsor has reviewed the work plan:

✓ Yes, the sponsor has reviewed and approved the project work plan above.

STATUS REPORTS

Paste all [status reports](#)
after this slide.

February Status Report: Update

Summary

My project is progressing well. This month, I met with my Capstone sponsor to check in about the project and discuss options for prototyping our database. I also met with Ana, who pointed me towards some resources for contact record management software that I explored. I was able to begin inputting data from WCLS into some of these software systems and send those drafts to my sponsor to review.

Key Milestones

- Continued iterating database concept with project sponsor (Michael Cox), checking to ensure that project is meeting initial charter requirements and WCLS project proposal needs
- Gathered information about contact record management software to understand range of options for Community Stakeholder database
- Began inputting community contact data from WCLS into Airtable

Issues and Challenges

So far, the contact record management software I've been using has worked out well.

Additional Notes or Highlights

Thank you Ana for your help with software suggestions!

March Status Report: Update

Summary

My project is continuing to progress well. I created prototypes of the Community Stakeholder database on Airtable and sent them to my project sponsor to review and give feedback on. Since both he and I are preparing to attend WLA at the end of February/beginning of March, we agreed to check back in after the conference is over to discuss next steps and iterations of the database.

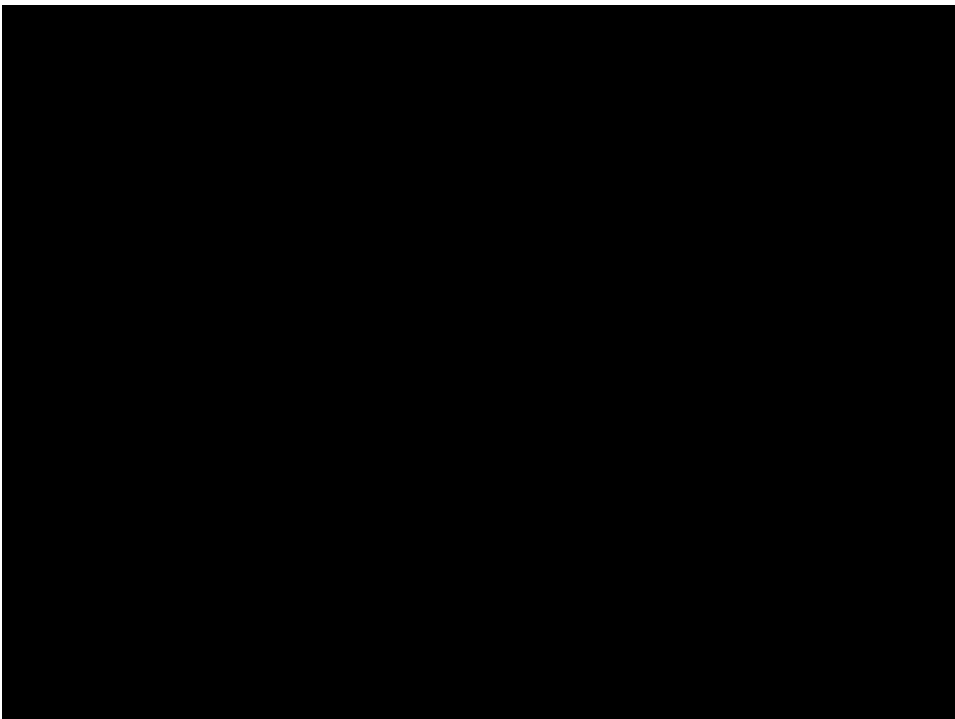
Key Milestones

- Completed inputting WCLS contact info into Airtable
- Sent Airtable prototype to Michael Cox at WCLS to review
- Established check-in plan with Michael to discuss prototype and next steps

Issues and Challenges

Because of WLA scheduling, it was more difficult to find time to meet with Michael this month. I'm anticipating more frequent communication after the conference is over on March 3rd.

Zoom Video Link



April Status Report: Update

Summary

My project is still on track. I've completed the Airtable with community contacts and am working on wrapping up this stage of my project. I'm communicating with my project sponsor to determine recommendations for implementing the Community Contacts Database into WCLS. I may also work with my sponsor to write up some guiding questions and ideas for the library staff to continue using and adding to the database.

Key Milestones

- Completed Community Contact Database
- Touched base with project sponsor to determine wrap-up steps

Issues and Challenges

I started a new job this month which has made my schedule tighter, but because I was able to get work done on my project over winter, so far it's been manageable to finish up the deliverables for the database.

CAPSTONE PRESENTATION COMPONENTS

Document your
Presentation
Components*
after this slide.

* All projects will have some deliverables, but some may have additional ones to document (e.g. poster, exhibit, website, report, etc.).



Cataloging Community Stakeholders

Madeline Schroeder

Team and Sponsor Introduction

Mady Schroeder
UW MLIS Candidate '24



Michael Cox
Deputy Director, Whatcom
County Library System



Project “Problem”

- Inconsistency in tracking data on community partners at WCLS
 - Staff turnover
 - Large service area
 - Maintenance/Upkeep of contact repositories
- Need for streamlined contact management tool



Step 1: Designing With WCLS

- In December, held Design Clinic with WCLS Branch Managers and Leadership
- Participatory Design Framework
 - Defining project scope
 - Identify community engagement needs and hopes
 - Allow space for open-ended feedback and ideation

7-Step Design Clinic Format

1. **"Could you help me..." (<2 mins)**
 - a. A member asks for help related to a specific challenge in their ongoing/upcoming work, with brief context/background to provide a frame.
2. **"This work is important to me because..." (<1 min)**
 - a. The member who made the request talks briefly about the larger goals and aspirations of their community work.
3. **"Share more about..." (4 mins + additional context)**
 - a. Group members inquire about the context/circumstances surrounding the request for help.
 - b. *At the end of this step, the facilitator should ask the member making the request if she/he/they want to share essential additional context (since they will be silent for the next two steps)*
4. **"This makes me think of..." (4 mins)**
 - a. Group members share experiences and stories that this challenge makes them think about, related to work or broader life experiences. *Note: the member making the request listens quietly during this time.*
5. **"You might try..." (4 mins)**
 - a. Group members provide suggestions about wise next steps to move the work forward. *Note: the member making the request is still listening quietly.*
6. **"You have me thinking..." (<2 mins)**
 - a. The member who made the request shares their thoughts about the conversation. They might choose to touch on aspects including...:
7. **"I would like to keep in mind..." (~2 mins)**
 - a. All members go round-the-circle sharing something notable about the conversation by completing the thought, "I would like to keep in mind..." *Note: Sharing by each member should be concise – 1-3 sentences.*



Design Clinic Takeaways



1. Sustainability

- Align with existing community contact information
- Integrate into staff workflow
- Easy to update

2. Design

- Familiar or easy-to-learn interface
- Facilitate note-taking
- Afford searching and filtering by certain criteria
 - Type of contact
 - Library Branch

Step 2: Project Proposal

- Feedback from Design Clinic used to draft WCLS Project Proposal
 - Used WCLS documents
- Proposal elements:
 - Project Scope and Concept
 - Resources
 - Timeline
 - Value Scenarios

2. Anthony is the newly hired Branch Manager for the North Fork library branch. He wants to reach out to key community stakeholders in North Fork to introduce himself and learn about how to support existing relationships between the library and the North Fork community. He uses the "Cataloging Community Stakeholders" tool to search for community members in North Fork who the previous Branch Manager had established relationships with, and reaches out to each one to schedule one lunch meeting per week to introduce himself. By the end of his first six months on the job, Anthony has met 25 community stakeholders. Since Anthony used the "Community Stakeholders" catalog, he was able to hit the ground running and maintain existing connections between the library and community without starting from scratch.

Step 3: Database Development

	WCLS Branch	Group Name	WCLS Contact	Contact First Name
2	BB	Birch Bay Chamber of Co...	Dianne Marrs-Smith	Danielle
3	BB	Birch Bay Parks & Recrea...	Dianne Marrs-Smith	
4	BB	Birch Bay Water and Sew...	Jackie Saul	
5	BB	Birch Bay Watershed and ...		Doralee
6	BB	Friends of Birch Bay Libra...	Dianne Marrs-Smith	Dianne
7	BB	Whatcom County Cemete...		
8	BK	Glenhaven Lakes Club	Greta Haas	
9	BK	Samish Water District (La...		Ken
10	BK	Wickersham Little Brown ...		Kenneth
11	BL	Blaine Birch Bay Park and...	Jonathan Jakobitz	Kaileigh
12	BL	Blaine Boys & Girls Club		
13	BL	Blaine Chamber of Comm...	Jonathan Jakobitz	Sheila
14	BL	Blaine Chamber of Comm...	Jonathan Jakobitz	Carroll
15	BL	Blaine City Council	Jonathan Jakobitz	Kerena
	+ Add...	Blaine Food Bank	Jonathan Jakobitz	Sally

- Prototyped contact record management software
 - Excel
 - Airtable
 - Salesforce
- Landed on Airtable
 - Easy to import existing data
 - Can add filters/tags
 - Automatically updates



Wrap Up and Next Steps



1. Handoff Database

- Have forwarded complete database to WCLS staff

2. Offer Tutorial Support

- “How-to” video guide on searching and filtering in database
- Reference questions for gathering information

The background is a white canvas decorated with watercolor-style splatters and brush strokes in shades of yellow and orange. There are several large, irregular brush strokes: one in the top left, one in the top right, and one in the bottom right. Scattered throughout the page are numerous small, circular and oval-shaped splatters of varying sizes and colors, creating a textured, artistic effect.

**Thank
You!**

FINAL REPORT

Please respond to each section; some sections may be more appropriate to your project so each response may vary in length.

You are encouraged to export these pages as an update for your sponsor as well.

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Final Report: Summary

I was able to successfully create a searchable database for the Whatcom County Library System to upload and maintain information about key community stakeholders.

The first phase of my project included consulting with WCLS staff to determine the scope and need for this tool, and holding a Design Clinic to gather input from staff about how the tool should operate. I collaborated with my project sponsor, Michael Cox, to develop a framework for the Design Clinic that used guiding questions to help built participatory feedback, and successfully held the Clinic with WCLS Branch Managers in December. Michael and I debriefed that feedback together to discuss how to move forward with developing a digital repository tool that met the needs of staff.

The second phase of the project involved researching different contact record management software systems to determine the best fit for important existing staff data about community stakeholders into a searchable and easy-to-use tool. I consulted with Anna Bennett, who shared information about a number of these software systems. After prototyping a number of them with a small set of WCLS community contact data, I determined that Airtable was the most appropriate system to use.

Finally, the third phase of the project involved transferring an existing Excel sheet of “Master Community Contact” data from Excel into Airtable. I completed this step, checked to ensure that all the search criteria specified by staff was included, and sent to Airtable tool over to Michael to share with WCLS staff.

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Final Report: Recommendations

I was able to complete the main objective of my project, which was to create a searchable database to house community contact information for the Whatcom County Library System.

Michael and I had discussed the possibility of creating supplemental materials to advise the maintenance of this data, and the sourcing of new information from community stakeholders. However, we didn't end up having time to include this in the project deliverables. I also pitched creating a "how-to" video or document walking WCLS staff through using the database to search for specific information, but have not heard back about whether this is something the library would like.

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Final Report: Support

WCLS Staff will be responsible for supporting and maintaining the Community Stakeholder database. Because of this, I intentionally worked with WCLS staff to choose a software platform that would be easy to maintain and integrate into staff workflow.

Staff are welcome to contact Madeline with questions about the deliverable, and Madeline is welcome to discuss the project in future job interviews or workplaces.

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Final Report: Handover

Michael Cox is the WCLS staff member who has direct access to the Community Stakeholder database and will be responsible for disseminating the tool to WCLS staff. Staff will have access to the tool and will be able to add and update information at will.

Michael and I discussed what ongoing maintenance would look like, and agreed that while WCLS has the final say over how often the database would be updated, it would likely make the most sense to have this be quarterly practice for Branch Managers to complete.