

DOWN TO THE WI+RE:

Transitioning to paperless grant project management

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PROJECT OVERVIEW

The purpose of this project was to find ways in which the WI+RE team can move to sustainable and responsible paperless grant project management — while keeping its rapid, iterative workflow in tact.

This process was broken down into four main steps:

1. Record Inventory
2. System Analysis
3. Needs Assessment
4. Recommendations

THE CLIENT

A cross-campus, collaborative community dedicated to helping learners develop strong research, writing and information literacy skills.

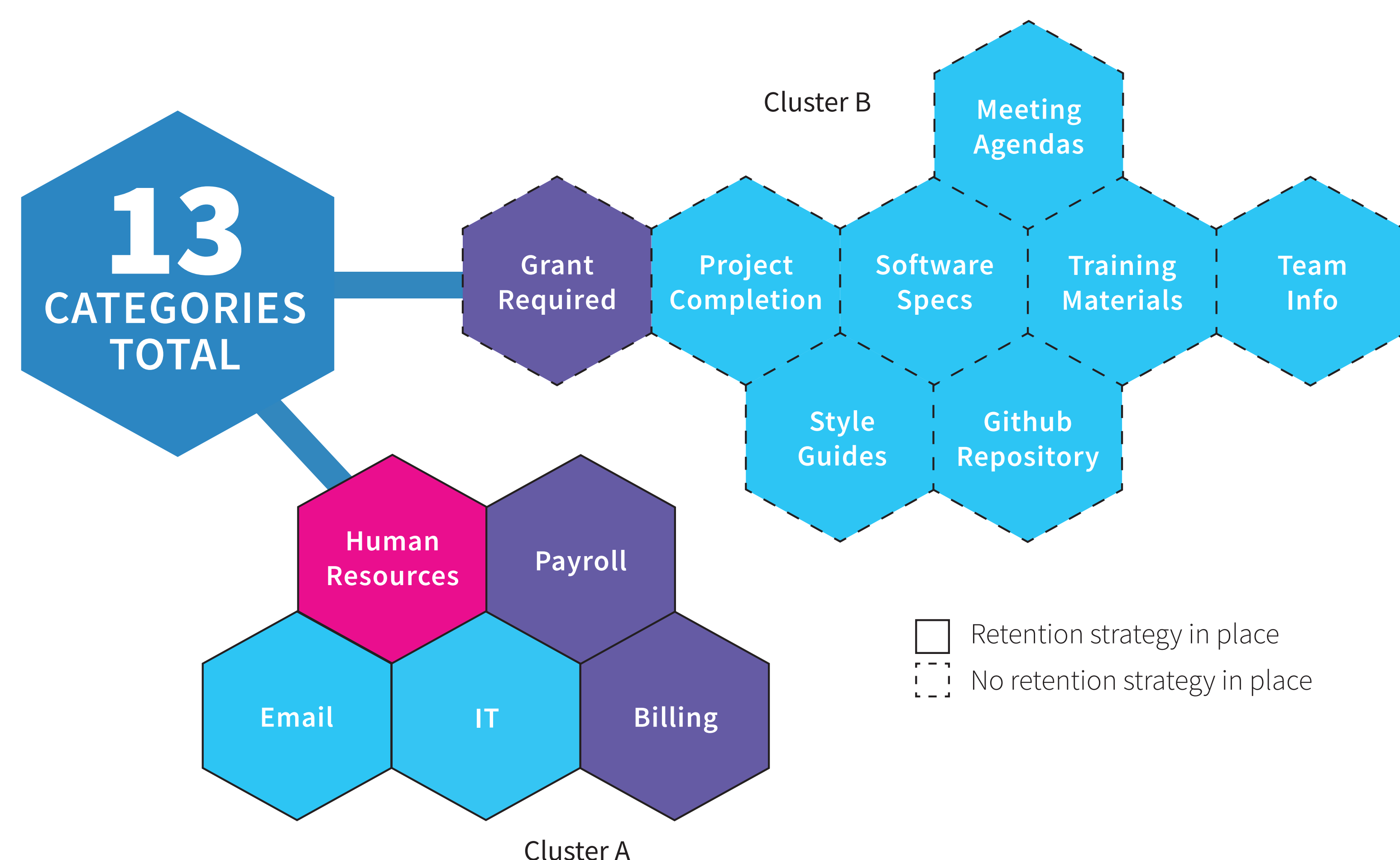
WI+RE
WRITING INSTRUCTION *and*
RESEARCH EDUCATION

UCLA Library
Writing Programs
Center for Digital Humanities
Centers for Undergraduate Research

1 RECORD INVENTORY

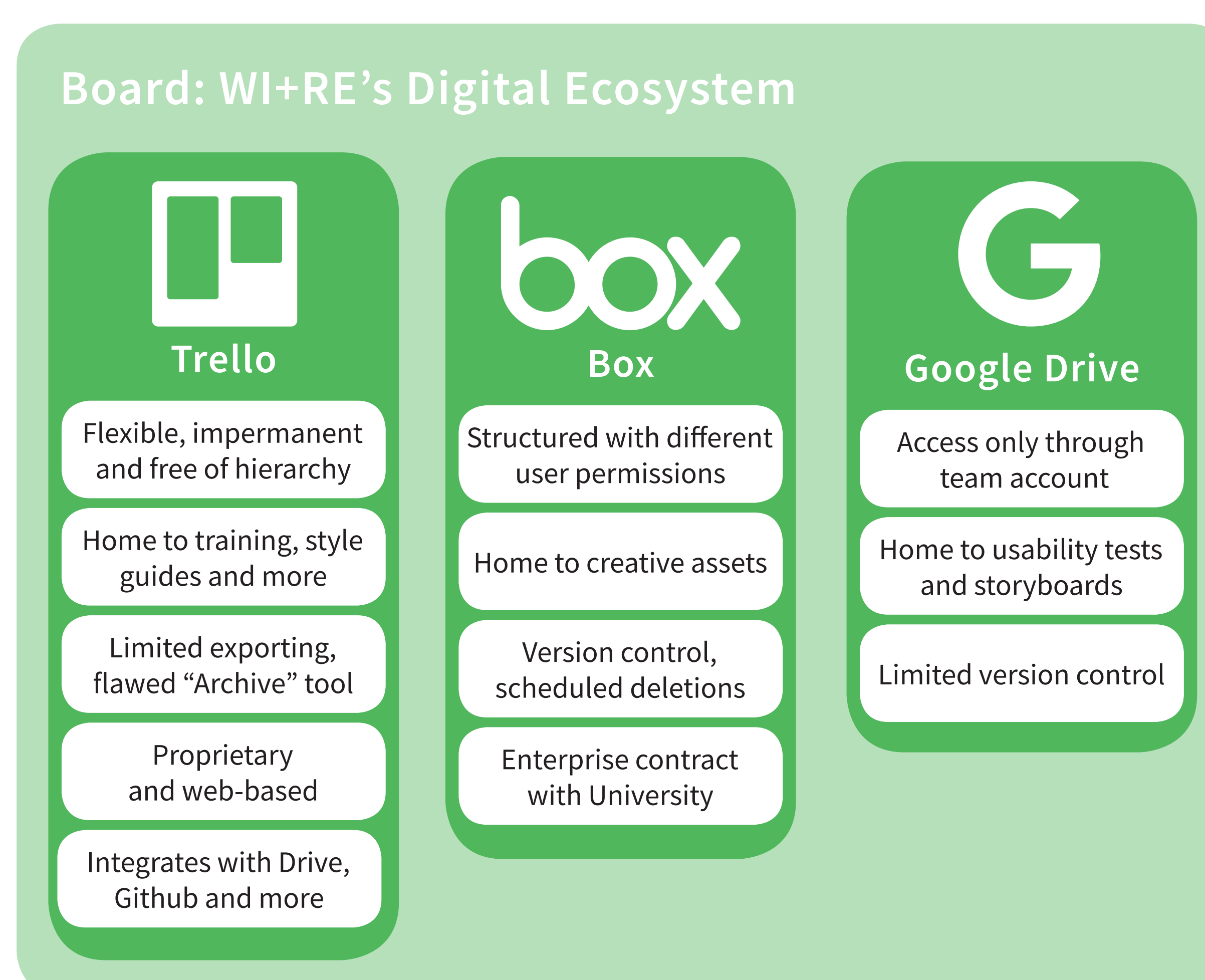
What kind of records are the team creating?
Are they **paper-based**, **digital** or **hybrid**?

- Two clusters of records emerged – records administered by other campus departments and ones by WI+RE. The scope of the project shifted to focus exclusively on Cluster B.
- The majority of the records without retention strategies in place are related to organizational memory and practice.



2 CURRENT SYSTEMS

Trello is the team's central platform – using themed boards, lists and cards to communicate, as illustrated below.



4 RECOMMENDATIONS

Modular strategies for moving forward – each step moving the team toward sustainable and compliant paperlessness.

Create a records repository in WI+RE's Box space

With version control, automated deletion, tiered access and the security of a contract with the university, Box is a promising recordkeeping tool. It is also already in the WI+RE toolbox and will not require additional software cost or training time.

Perform one-time mass export of information from Trello to PDFs

The targeted content should include personnel information, training materials, style guides and software specifications/instructions. This tedious one-time labor certainly takes less time than rewriting all of these important materials.

Integrate exporting Trello cards as PDFs into project workflow

Add exporting meeting agendas, usability testing forms and results, and project progress reports into the project workflow template as a scheduled item.

Assemble WI+RE records retention cheat sheet

Expedite record creation and logging by making answers to questions (what to keep, how to label it, where to save it) easily available.

Write cover letter template for granting agencies

Helps keep track of project progress and ensures compliance with grant requirements.

Invest in an offline backup of records