

Project folders
00_INTAKE
Proposed visuals
01_Pre-production
Style-boards
Scripts-DRAFT
Scripts-REVISED
Reference-materials
02_Production_SDLI-only
Assets
Scripts-FINAL
RAW-video-local-only
03_Post-production-SDLI-only
00_Rough-cut
Adobe-project-files
04_Post-production
04_Final-cut
Podcasts
05_Project-notes_SDLI-only

- Generative AI use.
- New step 2024FA.

Monday.com boards and columns

L2: Project tracker

Initiation
0 Provide guidance on the IC system and media design and production

Guidance note
Do this at the kick-off meeting.

Collection
1 Complete milestones schedule document with ID
2 Share milestones schedule document with faculty
3 Create project folder(s) and share
4 Input timeline in L2 board
5 Provide status update to SDLI director (via email)

Guidance note
Complete within 48 hours of kick-off meeting. This establishes expectations for the partnership. Get this out and discuss with faculty quickly. Meet together with all partners and lock-in agreement on timeline. Refer to SDLI standards and SDLI Staff handbook. Take dates from milestone schedule and input them into the timeline column on this board. DO NOT change these dates if a project slips. Keep records on slippages. Thoughtfully tell what has happened, what you are doing, and what you plan to do in the next steps of the project. This should be a detailed summary as you should have already been communicating updates. (In the subject line of your email, state the course acronym, number, phase and step in the process.)

Design: Transition from IDT
6 IDT Handoff meeting – Media plan and outlines
7 Review media plan, outlines and citations
8 Copy ALL course materials for media to SDLI folders
9 Update transit wait time in L3 board
10 Provide status update to SDLI director (via email)

Guidance note
During IDT meeting receive and discuss materials. Going forward, setup your own meetings with faculty (invite ID). Independently review, annotate, align and begin to create ideas for the style boards. (Reference SDLI standards and SDLI Staff handbook.) Copy/save all received materials from ID and faculty into SDLI folders. Update number of hours that you spent waiting for ID to provide the media plan, outlines and citations list. Thoughtfully tell what has happened, what you are doing, and what you plan to do in the next steps of the project. This should be a detailed summary as you should have already been communicating updates. (In the subject line of your email, state the course acronym, number, phase and step in the process.)

Design: Conceptualization
11 AI: Use to orient self to course content
12 AI: Use to draft storyboard outlines and visuals
13 Design/redraft assets for instruction
14 Create style boards – Miro
15 Notify SDLI director (via email) of style board completion
16 Plan for design meeting #1
17 Invite partners to design meeting #1
18 Provide status update to SDLI director (via email)
19 Present design concept and AI output at team meeting

Guidance note
Discuss with AI the course content including ways that may be approached with digital communications. Brainstorm with AI both a communications structure and visual examples. Store in cloud folder "02_Production_SDLI-only". Complete in Miro. Store in cloud folder "01_Pre-production". Discuss these with the SDLI director. Plan for a 60-120 minute collaborative meeting. (See notes on 'Conduct design meeting #1'.) Send an email to partners inviting them to the meeting and giving them some insight into what you will do. Thoughtfully tell what has happened, what you are doing, and what you plan to do in the next steps of the project. This should be a detailed summary as you should have already been communicating updates. (In the subject line of your email, state the course acronym, number, phase and step in the process.) Plan to share your design and output you have received from AI at the weekly team meeting. Request time in your status update.

Design: Joint ideation
20 Hold design meeting #1
21 AI: Use to ideate content and visuals in DM#1
22 Update style boards and media plans
23 Share final style boards – Miro
24 Tell faculty to script
25 Provide status update to SDLI director (via email)

Guidance note
Lead a 60-120 minute in-person creative discussion going through each style board jointly adding-in, removing relocating different parts. This is the 1 chance for everyone to air their ideas. During design meeting #1, use and demonstrate AI to expand on ideas with faculty and generate visual content. Based on design meeting #1, make adjustments to style boards. Likely you will have edited boards together. Clean them up for smooth scripting and production in next steps. Complete in Miro. Store in cloud folder "01_Pre-production". Notify the faculty that the style boards have been updated and are not complete. Tell them to write scripts for agreed upon lengths following these boards as a guide. Tell them that if they have new ideas to reach out to you quickly so that you can discuss. Thoughtfully tell what has happened, what you are doing, and what you plan to do in the next steps of the project. This should be a detailed summary as you should have already been communicating updates. (In the subject line of your email, state the course acronym, number, phase and step in the process.)

Design: Scripting
26 Remind faculty (via email) to upload draft scripts
27 AI: Use to assist in script writing
28 Copy-edit draft scripts (Pass 1)
29 AI: Use to assist in script editing
30 Save revised scripts – Pre-production
31 Optional: Gather IDT input on scripts (Pass 2)
32 Optional: Meet with ID about script review
33 Tell faculty to review and edit scripts (Pass 3)
34 Invite partners to design meeting #2
35 Update script wait time in L3 board
36 Provide status update to SDLI director (via email)

Guidance note
Store DRAFT in cloud folder "01_Pre-production". If the faculty are having trouble getting-started writing scripts, create a draft and share. You may also make suggestions on how they can use AI themselves to get-started. The MP is primarily responsible for scripts. As they come in read and copy-edit them for on-screen delivery, scope and typos. Only the MP communicates with faculty on scripts. Ideas may come from scripts, but be careful to unnecessarily iterate on design. Allow AI to have a pass at the script to clean-up spelling, grammar, and punctuation. Use AI to make suggestions on length, re-structuring parts, and aligning with learning objectives. Store REVISED in cloud folder "01_Pre-production". Once you have edited scripts you may share them with the ID for awareness and/or comments. Track the time IDs take in the L3 board. Ideas may come from scripts, but be careful to unnecessarily iterate on design. If you shared scripts with the ID, meet with them one-on-one. It is MP discretion to accept or reject comments. Give ID a 24 hour deadline. IDs should review for 1) terminology, 2) spelling, 3) accessibility and 4) trimming length. IDs should not be designing. Send revised scripts to faculty and ask them to review. Ask them to ensure these are aligned with the style boards and caution them on designing. Give faculty a deadline. Send an email to partners inviting them to the meeting and giving them some insight into what you will do. Update the number of hours that you spent waiting for ID script reviews. Thoughtfully tell what has happened, what you are doing, and what you plan to do in the next steps of the project. This should be a detailed summary as you should have already been communicating updates. (In the subject line of your email, state the course acronym, number, phase and step in the process.)

Design: Studio recording orientation
37-S Hold design meeting #2
38-S AI: Use as helpful to ideate content, visuals, address scripts in DM#2
39-S Save scripts as final scripts
40-S Gather final citations list and images from ID
41-S Conduct studio production orientation
Sub: Record and discuss test footage
Sub: Provide guidance on recording day
42-S Set recording days and times with faculty
43-S Provide status update to SDLI director (via email)
44-S Present final design and AI output at team meeting

Guidance note
Lead an in-person script review and studio orientation discussion. The purposes of this meeting is to jointly review scripts, make any additional changes together and lock these in as final. You may potentially use this time to also make adjustments to the style boards (i.e. design documentation) that anyone can use to build the media. During design meeting #2, use and demonstrate AI to expand on ideas with faculty, generate visual content, address scripts and connection to on-screen plans. Store FINAL in cloud folder "02_Production_SDLI-only". It is probable that faculty will 'tweak' scripts. Save the agreed upon final version just in case. Collect from the ID the final citations list and any remaining images needed from them for production. Follow SDLI standards and guidebook. Bring faculty into the studio for 30-45 minutes. Build their comfort with the environment, record test footage and provide other guidance. Work directly with the faculty to gather their availability. Get agreement and lock those in fast. Thoughtfully tell what has happened, what you are doing, and what you plan to do in the next steps of the project. This should be a detailed summary as you should have already been communicating updates. (In the subject line of your email, state the course acronym, number, phase and step in the process.) Plan to share your design and output you have received from AI at the weekly team meeting. Request time in your status update.

Design: Schedule studio recording
45-S Schedule in-person recording dates and times in studio calendar
46-S Invite faculty (via email) to recording events
47-S Tell ID (via email) recording dates and times
48-S Provide status update to SDLI director (via email)

Guidance note
Add recording dates and times to the internal SDLI scheduling calendar. Add the faculty to the studio schedule invitation. Add the ID to the studio schedule invitation or email them the dates and times. For all recording the SDLI staff will be responsible for providing direction to the faculty. Thoughtfully tell what has happened, what you are doing, and what you plan to do in the next steps of the project. This should be a detailed summary as you should have already been communicating updates. (In the subject line of your email, state the course acronym, number, phase and step in the process.)

Design: Remote recording orientation
37-R Hold design meeting #2
38-R Save scripts as final scripts
39-R Gather final citations list and images from ID
40-R Conduct remote production orientation
41-R Set recording days and deadline with faculty
42-R Tell ID (via email) recording dates and times
43-R Provide status update to SDLI director (via email)

Guidance note
Lead a remote script review and recording orientation discussion. The purposes of this meeting is to jointly review scripts, make any additional changes together and lock these in as final. You may potentially use this time to also make adjustments to the style boards (i.e. design documentation) that anyone can use to build the media. Store FINAL in cloud folder "02_Production_SDLI-only". It is probable that faculty will 'tweak' scripts. Save the agreed upon final version just in case. Collect from the ID the final citations list and any remaining images needed from them for production. Follow SDLI standards in handbook. Hold a Zoom meeting to help set-up recording environment then send written guidance afterwards. Work with faculty to establish when they will record and deliver recorded media. Add the ID to the studio schedule invitation or email them the dates and times. For all recording the SDLI staff will be responsible for providing direction to the faculty. Thoughtfully tell what has happened, what you are doing, and what you plan to do in the next steps of the project. This should be a detailed summary as you should have already been communicating updates. (In the subject line of your email, state the course acronym, number, phase and step in the process.)

Production: Capture
48 Record studio video and/or audio
49 Gather remote video and/or audio
50 Store RAW footage – Production_SDLI-only folder
51 Update scheduling calendar with accurate dates and times
52 Provide status update to SDLI director (via email)

Guidance note
Take faculty into the studio to record. IF they record at-home, mark this step as "INCOMPLETE". Gather from the faculty their remote/at-home recorded media. IF they record in studio, mark this step as "INCOMPLETE". Store in cloud folder "03_Production_SDLI-only". Update how long recording actually took in the calendar for SDLI director data collection. Thoughtfully tell what has happened, what you are doing, and what you plan to do in the next steps of the project. This should be an update as you should have already been providing updates.

Post-production: Rough cut (RC)
53 Review RAW footage
54 Edit footage into RCs
55 Export RCs as PRO-RES
56 Send exported video files for visuals/graphics
57 Store RCs in cloud – Production_SDLI-only folder

Guidance note
Follow SDLI standards in SDLI Staff handbook. Follow SDLI standards in SDLI Staff handbook. Follow SDLI standards in SDLI Staff handbook. Follow SDLI standards in SDLI Staff handbook. Store in cloud folder "03_Production_SDLI-only".

Post-production: First cut (FC)
58 Complete visuals/graphics/animations
59 Build-in text, citations, and visuals/graphics/animations
60 Export FCs as LOW-RES
61 Create Frame.io project, FC and FN folders and set FC folder to Private
62 Upload to Frame.io project and FC folder
63 Notify SDLI director for review
64 Revise FC with SDLI director review comments and produce FC(v2)
65 Export FC(v2) as LOW-RES and upload to Frame.io FC folder
66 Notify SDLI director for review
67 Repeat steps 64-66 if additional edits
68 Gather approval to move forward to FN

Guidance note
Follow SDLI standards in SDLI Staff handbook. Follow SDLI standards in SDLI Staff handbook. Follow SDLI standards in SDLI Staff handbook. Plan FC folder to be Private for SDLI internal review purposes. FN folder will remain open for later SME and ID review. Follow SDLI standards in SDLI Staff handbook. Send an email to the SDLI director giving notice that FCs are ready for review. Follow SDLI standards in SDLI Staff handbook. Make all requested edits and produce a new version for (internal) review. The file name should be the same and stack-up in Frame.io as v2 and so on. Send an email to the SDLI director giving notice that FCs are ready for review. Produce another version of FC until it is ready to be shared with partners. Gather from SDLI director approval at a meeting, in email, or in Frame.io comments that the media is ready for the next step.

Post-production: Fine cut (FN)
69 Convert cleared FC versions to FNs
70 Upload to Frame.io project and FC folder
71 Notify partners for review
72 Update FN wait times in L3 board

Guidance note
Follow SDLI standards in SDLI Staff handbook. Follow SDLI standards in SDLI Staff handbook. Follow SDLI standards in SDLI Staff handbook. Send 1 email to all partners. Provide a deadline and ask to focus comments on time cuts, on-screen learning content (per the design), typos, movements and transitions. Reviews SHOULD NOT for design. Update the number of hours that you spent waiting for the ID and faculty to provide feedback on FNs.

Post-production: Final cut (FX)
73 Review FN partner feedback with SDLI director
74 Edit FN from partner feedback
75 Export FXs as PRO-RES
76 Upload FXs to cloud storage – Post-production folder
77 Notify ID of FX files availability

Guidance note
Reach out to SDLI director to discuss before making edits to multimedia. Follow SDLI standards in SDLI Staff handbook. Follow SDLI standards in SDLI Staff handbook. Store in cloud folder "04_Post-production". Email a link to the folder to the ID. The ID should download them independently.

Close-out
78 Complete ALL L2 project board fields
79 Complete ALL L3 project board fields
80 Save ALL (Adobe) project files to cloud storage – Production_SDLI-only folder
81 Deactivate review links to the project in Frame.io
82 Move project (FC and FN files) in Frame.io to archival storage
83 Move project RAW and RC files to cloud storage
84 Update the online course media catalog spreadsheet
85 Update the media tracker assets spreadsheet
86 Close any active links in cloud folders for completed projects
87 Provide final update SDLI director (via email)

Guidance note
This board. Everything should already be complete. Ensure data for all line items is included. Store in cloud folder "03_Post-production-SDLI-only". Follow SDLI standards in SDLI Staff handbook. Follow SDLI standards in SDLI Staff handbook. Follow SDLI standards in SDLI Staff handbook. Add the course/project to the file "SDLI_Media-OCM-catalog.xlsx". Add an accounting of all digital assets used for the course/project to the file "SDLI_Tracker-Media-assets_2023-2024.xlsx". Close all active links or if they need to remain open for a time, reset the expiration date to close within 48 hours. Thoughtfully tell what has happened in the project. For example: 1) successes and failures; 2) challenges; 3) communication; 4) innovations; 5) implementation of genAI; and 6) partnership. There may be other things you wish to address. (In the subject line of your email, state the course acronym, number, phase and step in the process.)