**Digital Project Planning Worksheet
Wisconsin Library Association conference
October 25, 2013**

**Section 1: Planning**

**Vision and Goals**

How will this project support the mission and vision of your organization?

**Audience**

Who is this digital collection for? Identify your target user groups.

**Selection**

What materials do you plan to digitize?

Consider the following for each item or group of items you select:

|  |  |  |
| --- | --- | --- |
|  | **Yes** | **No** |
| Frequently requested by our patrons/visitors? |  |  |
| Not found anywhere else on the Internet? |  |  |
| There is enough accurate information available about the item to add useful context for our audience (for example, we know or can find out names of people, locations, dates).  |  |  |
| We have the appropriate equipment to create accurate digital copies, or resources available to outsource reformatting if necessary.  |  |  |
| In stable condition and will not be damaged by scanning or other handling? |  |  |
| In the public domain –OR– we have secured permission from the rights holder to the materials available online. |  |  |

Something about developing or looking to existing collection development statement?

**Copyright**

Who owns the copyright to the materials you wish to digitize? List items in the categories below. For assistance in determining copyright status, consult Copyright and the Public Domain in the United States (Cornell University) <http://copyright.cornell.edu/resources/publicdomain.cfm> or Copyright Term Calculator (Public Domain Sherpa) <http://www.publicdomainsherpa.com/calculator.html>

|  |  |  |  |
| --- | --- | --- | --- |
| **Public domain (no copyright restrictions)** | **Copyright owned by your organization** | **Do not own copyright (need to obtain permissions)** | **Undetermined (need further research)** |
|  |  |  |  |

**Budget**

What are the potential expenses for this digitization project?

|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | **Already have** | **Need to acquire** | **Cost** |
| Scanner |  |  |  |
| Digital camera and related equipment |  |  |  |
| Image editing software (e.g. Photoshop or GIMP) |  |  |  |
| OCR software (e.g. Adobe Acrobat or ABBYY Fine Reader) |  |  |  |
| Access software  |  |  |  |
| Storage (e.g. server, external hard drives, cloud storage provider) |  |  |  |
| Vendors |  |  |  |

**Funding**

What sources of funding will you use to carry out this project? (existing budget, grants, etc.)

**Section 2: Creating**

Reformatting

What format(s) are the items you plan to digitize? This will determine what equipment is needed to digitize your items.

* Photographs, postcards or other images
* Oversized images (e.g. maps, blueprints)
* Slides or glass negatives
* Books or other printed texts
* Letters or other handwritten manuscripts
* Three-dimensional objects
* Audio
* Moving images
* Microfilm
* Other:

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Consider whether these materials will be reformatted in-house or outsourced to a vendor.

* In-house. Do you have the necessary equipment to produce quality digital images? Have the staff who will do the reformatting received training in appropriate file resolution, file formats, editing of derivatives, etc.?
* Outsourced. Have you received estimates from multiple vendors? Have they provided test files for preview?

Printed text – have you acquired OCR software to generate searchable transcripts? Y/N

Handwritten text – do you have staff available to manually generate transcripts? Y/N

At what resolution and bit depth will you scan your master copies? (this will vary depending on format, e.g. 4” x 6” photographs – 600ppi, 24-bit color; oral histories – 96 kHz, 24-bit depth)

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Which file format(s) will you use for digital masters? (check all that apply)

* TIFF (images or documents)
* JPEG2000 (images or documents)
* PDF/A (documents)
* AVI (moving images)
* MOV (moving images)
* WAV (sound)
* Other:

**Metadata**

Does metadata already exist for individual items?

* Yes, detailed
* Yes, minimal
* No existing metadata
* Collection-level metadata or finding aid

Which metadata elements will you establish for this collection? To share your digital collection on the statewide level (through Recollection Wisconsin), eight metadata elements are required:

* Title
* Subject
* Type (Dublin Core Metadata Initiative type, e.g. Text, Still image, etc.)
* Format (Internet Media type, e.g. image/jpeg, application/pdf, etc.)
* File name
* Rights statement
* Submitter
* Date digitized

Other metadata elements may include (check those you intend to use):

* Creator (author, photographer, etc.)
* Description
* Date created
* Materials
* Location (community, county, state)
* Collection name
* Other:

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Some metadata elements, particularly Subject, benefit from the use of a controlled vocabulary – a predetermined list of authorized terms. Which controlled vocabularies, if any, will you use for this collection?

* Library of Congress Subject Headings (LCSH)
* Library of Congress Thesaurus for Graphic Materials (LCTGM)
* Getty Art and Architecture Thesaurus
* Getty Thesaurus of Geographic Names
* Nomenclature 3.0
* Locally generated list(s)
* Other:

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**File naming and organization**

Checksums

Access

**Section 3: Maintaining**

Storage

Reference

Marketing

Evaluation

**Section 4: Roles and Timeframe**

Determine what roles need to be fulfilled to complete the project, and if possible, identify who will take on these roles.

|  |  |  |
| --- | --- | --- |
| Role | Activities | Who’s responsible? |
| Project Manager | * Planning and budgeting
* Quality control
* Maintaining project timeline
 |  |
| Scanner | * Reformatting original materials
* Assigning file names
 |  |
| Cataloger | * Determining metadata standards
* Creating metadata
 |  |
| Digital archivist | * Creating checksums
* Moving digital content to storage locations
* Monitoring content
 |  |
| IT Specialist | * Installing, configuring and troubleshooting hardware and software
 |  |
| Outreach Specialist | * Developing and executing marketing plan
* Responding to reference requests
* Evaluating use of collection
 |  |
| Other |  |  |

Estimate the amount of time it will take to complete each task and goal. Always over-budget time needed to complete tasks. This will help ensure you fulfill your vision by your estimated completion date.