DIGITAL PROJECT PLANNING WORKSHEET

Section 1: Foundations

Name of Project: _____

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

Audience
Who are the audiences for this project? Identify your target user groups.

Barriers
What are the potential challenges or obstacles to completing this project?

Budget
What resources are needed to complete this project?

Resources	Costs	Funding sources
Hardware (e.g. scanner, digital camera, computer)		
Software (e.g. for online access, image editing, OCR)		
Storage (e.g. server, external hard drives, cloud storage provider)		
Vendor (outsourcing scanning or other activities)		
Other		

Section 2: Select

Scope
Describe the scope of this project and what is out of scope. (e.g. limited to before 1970; books only; our municipality only)

Checklist: Selection Criteria

Are items . . .	YES	NO
Frequently requested by our patrons/visitors/community members?		
Not found anywhere else on the Internet?		
Accompanied by enough information to add useful description? (for example, we know or can find out names of people, locations, dates)		
In stable condition and will not be damaged by scanning or other handling?		

What types of materials will you digitize? (check all that apply)

- o Photographs, postcards or other images
- o Oversized images (e.g. maps, blueprints)
- o Slides or negatives
- o Books or other printed texts
- o Letters or other handwritten manuscripts
- o Three-dimensional objects
- o Audio cassettes or VHS tapes
- o Film
- o Microfilm
- o Other:

    _____

Rights
What is the copyright status of the materials you will digitize? List items in the categories below.

Public domain (not in copyright)	Copyright is held by your organization	Do not own copyright (seek permission from rights holder)	Undetermined (need further research)

Section 3: Scan

Reformatting: Do-It-Yourself or outsource?
Factors to consider:

- o Are we willing to let the items out of our organization?
- o Can we get a good scan with existing equipment?
- o Do our staff/volunteers have the necessary skills and time to do this?
- o Is it more cost effective to have someone else scan it?

Original item dimensions	Scanning resolution	Bit depth	Capture mode	Spatial dimensions
Reflective materials: Photographic prints				
8 x 10"	400 ppi	8-bit or 24-bit	Grayscale or color	3200 x 4000 pixels
5 x 7"	625 ppi	8-bit or 24-bit	Grayscale or color	3125 x 4375 pixels
4 x 5"	800 ppi	8-bit or 24-bit	Grayscale or color	3200 x 4000 pixels
4 x 2.5"	1200 ppi	8-bit or 24-bit	Grayscale or color	4800x3000 pixels
Transparent materials: Film negatives and slides				
8 x 10" film negative	800 ppi	8-bit or 24-bit	Grayscale or color	6400 x 8000 pixels
4 x 5" film negative	1200 ppi	8-bit or 24-bit	Grayscale or color	4800 x 6000 pixels
35 mm neg or slide	4000 ppi	8-bit or 24-bit	Grayscale or color	5480 p on long side
Text and Manuscripts				
Text with image	400 ppi	24-bit	Color	---
Manuscripts	400 ppi	24-bit	Color	---

Minimum Digitization Capture Recommendations, Association for Library Collections and Technical Services (ALCTS), 2013:
http://www.ala.org/alcts/resources/preserv/minimum-digitization-capture-recommendations

Section 4: Store

File naming and organization
Which file naming convention will you use for this project?

- o Existing box/folder numbers
- o Existing item-level accession numbers or other ID numbers
- o Other. Describe: _____

Sample file name: _____

How will you organize and back up your working files while this project is in progress?

_____

_____

_____

Storage Locations
What will you use for long-term storage of your digital master files? Choose at least two formats.

- o Local area network/local server
- o RAID device
- o External hard drives
- o Cloud storage

- o Other:

_____

_____

How often will new digital items be moved to long-term storage locations?

- o Daily
- o Weekly
- o Monthly
- o When project is completed

Who will have access to the digital master files? Note any login/password information needed for cloud storage providers or other offsite storage options.

_____

_____

DOCUMENT
When project is completed, create a separate document to record essential information about the digital collection, including:

- Who created it, and when?
- File type and quantity (e.g. 876 TIFF files, 7 WAV files), and total size of files (e.g. 26 GB)
- Where is it stored?

Section 5: Share

Metadata
Does catalog information already exist for individual items?

- o Yes, detailed
- o Yes, minimal
- o No available information
- o Collection-level description, e.g. finding aid

Which metadata elements will you establish for this project?
To share your digital collection through Recollection Wisconsin and DPLA, four metadata elements are required: *Title, Subject, Type* and *Rights*.

Additional metadata elements may include (check those you will use):

- o Collection
- o Creator (author, photographer, etc.)
- o Date
- o Description

- o Location
- o Materials
- o Publisher
- o Other:

  _____

  _____

Using a controlled vocabulary – a predetermined list of authorized terms – is strongly recommended for Subject metadata. Which controlled vocabulary will you use for this project?

- o Library of Congress Subject Headings (LCSH)
- o Library of Congress Thesaurus for Graphic Materials (LCTGM)
- o Getty Art and Architecture Thesaurus (AAT)
- o Nomenclature 4.0
- o Locally generated list
- o Other:

  _____

Access

Are there any access restrictions associated with this project?

- o Access within institution only
- o Limited to specific IP addresses (e.g. on-campus use only)
- o No restrictions

What software platform will you use to provide online access to the project?

_____

What preparation is needed to work with this platform? (e.g. training, installing software, setting up a server)

_____

_____

Use/Reference

Who is responsible for responding to research queries?

_____

How will requests for copies be handled? Note any fees for reproductions and how files will be distributed.

_____

_____

Marketing

How will you promote this project to your audiences?

- o Highlight items on social media
- o Host in-person events (lectures, exhibitions, etc.)
- o Press release to local media
- o Share elsewhere on the web (our website, Wikipedia, etc.)
- o Other:

  _____

Evaluation

How will you evaluate the use and impact of this project? (web analytics, user surveys, etc.)

_____

_____

Section 6: Roles and Timeframe

Deadline for Completion

When do you expect to complete this project? _____

Role	Activity	Who's responsible?	Deadline
Project Management	Managing project timeline, budget and documentation		*ongoing*
	Researching copyright and obtaining permissions		
	Quality control		*ongoing*
Scanning	Reformatting original materials		
	Image editing		
	Assigning file names		
Cataloging	Determining metadata standards		
	Researching items		
	Creating metadata		
File Management	Moving digital files to storage locations		
	Uploading files to access platform		
	Monitoring files over time		*ongoing*
IT Support	Installing and troubleshooting hardware and software		
Outreach and Marketing	Developing and carrying out marketing plan		
	Responding to reference requests		*ongoing*
	Tracking use of collection		*ongoing*
Other			