Digital Project Planning Handout
Wisconsin Historical Society Local History and Historic Preservation Conference
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Section I:

Why Digitize?

What are your primary goals for this digital project? *Many of these may fit, but select the 2 or 3 MOST IMPORTANT goals or objectives.*

- ☐ Improve internal access and intellectual control (e.g. inventory)
- ☐ Improve public access to frequently-used items
- ☐ Improve public access to "hidden" or inaccessible items
- ☐ Protect fragile or at-risk items

- ☐ Generate revenue (e.g. sell reproductions)
- ☐ Use in programs (e.g. exhibits, presentations)
- ☐ Use by teachers and students
- ☐ Other:

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Scope and Scale

How will you set priorities for what to digitize? *Use these factors to evaluate potential digitization projects, inform selection for digitization and determine a prioritization score for a collection, item, or group of items.*

	No	Maybe?	Yes	Absolutely!
Value: Is there interest or value in these materials for genealogists, educators, researchers, community members, or other identified audiences?	1	2	3	4
Value: Do the materials contribute new voices or perspectives to the historical record (for example, materials document historically underrepresented groups in our community)?	1	2	3	4
Information context: Is there enough information available to add useful context (we know or can find out names of people, locations, dates)?	1	2	3	4
Availability: Are the materials unique and not already available online?	1	2	3	4
Legal/Ethical issues: Are the materials in the public domain (or we can get permission from the copyright holder) and there are no privacy concerns or other barriers to putting them online?	1	2	3	4
Condition: Are the materials in high-risk, deteriorating formats, particularly audiovisual recordings on media like audiocassettes, VHS tapes, CDs, or DVDs?	1	2	3	4
			TOTAL SCORE	

Scoring:

18 - 24 points: High priority for digitization

12 - 17 points: Medium priority

6 - 11 points: Low priority

Section II:

Resources

What resources are needed to successfully complete this project? *Specific costs may not yet be known, but keeping these categories in mind will help you build them into your project plan.*

RESOURCE	Is this already in place?	If yes, briefly describe. If no, what do we need to do to move forward?	COSTS
Skills and Knowledge (training, guidelines, technical standards)	Yes No N/A		
People (staff, volunteers, interns, vendors)	Yes No N/A		
Hardware (scanner, digital camera, computer)	Yes No N/A		
Software (for online access, image editing, text recognition)	Yes No N/A		
Storage (server, cloud storage, external hard drives)	Yes No N/A		
Other	Yes No N/A		

Section III:

Roles

Who will contribute to the project? *Consider permanent staff, short-term staff, volunteers, and interns at your organization and at partner organizations. Some or all of these roles may be filled by the same people or may not yet be filled.*

ROLE	ACTIVITY	Who's responsible? (individual names or positions)
Project Manager	- Monitor project plan, budget, and timeline - Coordinate project team members - Communicate with partners, vendors, and funders	
Digitizer	- Organize and prepare materials for digitization - Scan materials - Perform quality control review on digital files - Assign file names	
Cataloger	- Review copyright status and assign appropriate rights metadata - Determine metadata standards - Conduct research or provide context to describe items (subject expert) - Create metadata	
File Manager	- Install, configure, and troubleshoot any hardware or software - Move digital files to long-term storage locations - Regularly audit and update storage	
Outreach Specialist	- Promote project to identified audiences - Respond to research and permissions requests - Collect analytics and user feedback	
Other		