

Digital Project Planning Worksheet

This worksheet aligns with the seven focus areas of Recollection Wisconsin's [Digital Readiness Levels](#). For detailed guidance on any section, refer to the Recollection Wisconsin Digital Readiness Toolkit at <https://recollectionwisconsin.org/toolkit>.

Note: You may not have all of the answers at hand at the start of a project, and that's ok! Treat this worksheet as an outline of the key components you should prepare for as your project evolves, and a space to record decisions as your project progresses.

Focus Area 1: Plan and Prioritize

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:

How will this project support your organization's mission or strategic plan? *If your organization doesn't have a mission or strategic plan, how does the project fit with your current services and offerings?*

In one or two sentences, how would you describe the significance of this project to a board member, funder, or community members?

--

Scope and Scale

What types of materials will be included in this project? Check all that apply.

- | | |
|---|--|
| <input type="checkbox"/> Photographs, postcards, or other images
<input type="checkbox"/> Maps, blueprints, or other oversized images
<input type="checkbox"/> Slides, negatives, microfilm
<input type="checkbox"/> Books or other printed texts
<input type="checkbox"/> Other: _____ | <input type="checkbox"/> Letters, diaries, or other handwritten manuscripts
<input type="checkbox"/> Three-dimensional objects
<input type="checkbox"/> Analog Media: Film, Video, Audio
<input type="checkbox"/> Digital Media: optical, storage, born-digital |
|---|--|

Approximately how many items will be included in this project? _____

Describe the scope of this project. List any subjects, locations, date ranges, etc. that will be included in the project. (Example: Photographs and postcards from 1870-1970 depicting buildings and people in our county.)

--

Describe what is NOT in scope for this project. (Example: Content from outside our county or where the location is unknown.)

Resources and Roles

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		

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

What are the total estimated expenses for this project based on the table above? *Include recurring costs (software license, storage costs) as well as startup costs.*

What sources of funding will you use to carry out and sustain this project?

Focus Area 2: Obtain Permissions

What is the copyright status of the items in this project? *Check all that apply.*

If the copyright status is ...	Then ...
<input type="checkbox"/> No copyright in the United States – in the public domain	PROCEED. Describe how the public domain status was determined (i.e. publication date).
<input type="checkbox"/> In copyright – our organization is the creator and copyright holder	PROCEED.
<input type="checkbox"/> In copyright – copyright holder has granted permission to use	PROCEED. Make a note of when this permission was granted and where it is documented.
<input type="checkbox"/> In copyright – Rights-holder(s) Unlocatable or Unidentifiable – need to obtain permission to use	PAUSE. Request permission from copyright holder. If the copyright holder is unidentified, unlocatable, or not responding, document your attempts to contact.
<input type="checkbox"/> Copyright Not Evaluated – have not yet reviewed copyright	PAUSE. Conduct copyright evaluation before digitizing.

Other than copyright, are there reasons any items in the collection should NOT be made available online?

- ☐ Items depict minors (i.e. junior high or high school yearbooks published in the last 10 years)
 - ☐ Items include personally identifiable information (i.e. Social Security numbers home address, birth date)
 - ☐ Items depict Native American graves, ceremonies, or other culturally sensitive content
 - ☐ Items depict any burial sites (other than cemeteries)
 - ☐ Items depict medical patients, incarcerated individuals, or other protected populations
 - ☐ Materials depicting emergency response, crime scenes, or disaster relief efforts that may include images of wounded or deceased people
 - ☐ Other:
-

Do any materials in the collection warrant closer consideration before sharing publicly online? Consider adopting a harmful content statement or limiting public access to items with any of the following:

- ☐ Offensive/outdated racial or ethnic terms or depictions
- ☐ Offensive/outdated gender or relationship-related terms, such as those for LGBTQ+ people
- ☐ Items that “out” LGBTQ+ people if they were not publicly out during their lives

Focus Area 3: Digitize

In-House or Outsource?

For some projects, it makes sense to digitize the materials yourself. In other cases, working with a vendor or partner might be the way to go.

Some factors to consider:

Is specialized equipment needed to digitize the materials, such as audiovisual recordings, oversized items, or microfilm?	Y / N
Factoring in equipment purchases and staff or volunteer labor, will we save time and/or money by NOT doing it ourselves?	Y / N
Are we willing to lend the items out for digitization off site?	Y / N
Do we have the resources to adequately box and ship items to a vendor?	Y / N

Mostly Ys? Consider working with a vendor or partner to digitize.

Mostly Ns? This project is probably a good candidate for in-house digitizing.

Standards

What image resolution (ppi) and other standards will you use to create your digital files?

(Example: 800ppi, 24-bit color)

--

Which file format(s) will you use for your primary files? Check all that apply.

- ☐ TIFF (images or documents)
- ☐ JPEG2000 (images or documents)
- ☐ PDF/A (documents)
- ☐ AVI (moving images)

- ☐ MOV (moving images)
- ☐ WAV (sound)
- ☐ Other: _____

Focus Area 4: Describe

Metadata

Which metadata elements will you use to describe the items?

*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):

- ☐ Creator (author, photographer, etc.)
- ☐ Description
- ☐ Date created
- ☐ Formats/materials

- ☐ Dimensions
- ☐ Location (community, county, state)
- ☐ Name of collection
- ☐ Other: _____

File Naming

Consistent file naming is important for organizing your digital files and managing them in the future. *Some file naming tips: use only lowercase letters, numbers, dashes and underscores; don't use special characters such as ^" < > | ? \ / : @ ' * & . () ; don't use spaces; use leading zeros (001, 002, 003, not 1, 2, 3).*

Provide some example file names you will use for this project:

--

Focus Area 5: Share

If you will provide online public access to digital content, what access solutions will you use?

Check all that apply.

Eligible for harvesting by Recollection Wisconsin and DPLA:	
<input type="checkbox"/> CONTENTdm (hosted through Recollection Wisconsin) <input type="checkbox"/> CONTENTdm (self-hosted) <input type="checkbox"/> Omeka	<input type="checkbox"/> ResCarta <input type="checkbox"/> Partnership with your public library system
Not eligible for direct harvesting by Recollection Wisconsin and DPLA:	
<input type="checkbox"/> PastPerfect Online <input type="checkbox"/> Mukurtu <input type="checkbox"/> Internet Archive	<input type="checkbox"/> Our website <input type="checkbox"/> No online access - in-house use only <input type="checkbox"/> Other: _____

How will you promote this project to your target audiences?	
<input type="checkbox"/> Social media <input type="checkbox"/> In-person or virtual events (presentations, exhibits, etc.) <input type="checkbox"/> Press release to local media	<input type="checkbox"/> Announcement in organization's newsletter or blog <input type="checkbox"/> Bookmark, postcard, or other print material <input type="checkbox"/> Other: _____

After your project is completed or available, users may contact you with a research question, to share more information about an item, or to request permission to use an item. How will users contact your organization with these requests, and who is responsible for responding?

Focus Area 6: Store and Maintain

Where will you store your primary digital files? Choose at least two options. Best practice is to save three copies in different locations, including one off-site.

- ☐ Local area network or local server
- ☐ Server at a partner organization
- ☐ Cloud storage provider

- ☐ RAID device
- ☐ External hard drive
- ☐ Other: _____

How much storage space will you need?

Image files: _____ x _____ x 3 = _____ MB
 (# of files) (avg. file size in MB)

How often will you move digital files into the storage locations selected above?

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

Who will be able to access the digital files in long-term storage? Note any logins or contact information needed for cloud storage providers or other offsite storage.

Focus Area 7: Evaluate

Are any reports required when this project is completed, such as to a board or funding agency?
Note any reporting requirements and deadlines.

What kinds of information will you collect to understand how the digital project is being used?	
<div><input type="checkbox"/> Google Analytics or other web analytics</div> <div><input type="checkbox"/> Social media engagement metrics (likes, shares)</div> <div><input type="checkbox"/> Feedback survey to users</div>	<div><input type="checkbox"/> Tracking research inquiries or permission requests</div> <div><input type="checkbox"/> Other: _____</div>