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?

Appendix A: Digital Project Planning Worksheet
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.

- Photographs, postcards, or other images
- Maps, blueprints, or other oversized images
- Slides, negatives, microfilm
- Books or other printed texts
- Other: __________________________
- Letters, diaries, or other handwritten manuscripts
- Three-dimensional objects
- Analog Media: Film, Video, Audio
- 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.)*

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

<table>
<thead>
<tr>
<th>ROLE</th>
<th>ACTIVITY</th>
<th>Who’s responsible? (individual names or positions)</th>
</tr>
</thead>
</table>
| 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.

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

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:

__________________________________________________________________

Appendix A: Digital Project Planning Worksheet
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:

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

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: _______________________

Appendix A: Digital Project Planning Worksheet 84
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:

- CONTENTdm (hosted through Recollection Wisconsin)
- CONTENTdm (self-hosted)
- Omeka
- ResCarta
- Partnership with your public library system

Not eligible for direct harvesting by Recollection Wisconsin and DPLA:

- PastPerfect Online
- Mukurtu
- Internet Archive
- Our website
- No online access - in-house use only
- Other: ________________________

How will you promote this project to your target audiences?

- Social media
- In-person or virtual events (presentations, exhibits, etc.)
- Press release to local media
- Announcement in organization’s newsletter or blog
- Bookmark, postcard, or other print material
- 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?

- [ ] Google Analytics or other web analytics
- [ ] Social media engagement metrics (likes, shares)
- [ ] Feedback survey to users
- [ ] Tracking research inquiries or permission requests
- [ ] Other: ________________________