# Audiovisual Digital Readiness Self-Assessment Survey

This Audiovisual Digital Readiness Self-Assessment Survey was created by the Community Archiving Workshop (CAW) for use with the Digital Readiness Toolkit. The Digital Readiness Toolkit and the Audiovisual Digital Readiness Self-Assessment Survey offer a suite of tools and resources that help you with a customized plan to create, preserve, and provide access to your digital collections.

Note: while this self-assessment survey is aimed at organizations with audiovisual collections, it can easily be adapted for use with other formats. Please feel free to use the questions and structure to guide your own self-assessment!

**This Audiovisual Digital Readiness Self-Assessment Survey is the starting point for an organization assessing its digital readiness, with a focus on audiovisual collections.** It uses a series of questions to help your organization:

* Determine your digital readiness goals for your audiovisual collection and how they fit into your overall mission
* Identify your strengths and challenges in digital readiness
* Define and prioritize one to three digital projects
* Navigate the resources in the Digital Readiness Toolkit so that you can create a customized plan to carry out your digital project

**Digital project** is defined by CAW as any project that involves the creation, storage, and management of digital files. Throughout the Toolkit and this survey, we use the phrase "digital projects" as an umbrella term to encompass digitization as well as digital stewardship, or the ongoing work of maintaining digital collections.

Digital projects focused on audiovisual collections might include activities that:

* Digitize analog time-based media such as film or magnetic media
* Migrate digital files from optical media, such as DVDs or CDs, to more stable storage
* Reformat digital files from their original formats to a preservation-quality format (i.e. proprietary audio files to Broadcast WAVE)
* Transcode or edit files so they can be used for different purposes, such as for editing or streaming (for example, create clips for patron use)
* Create and implement a digital file naming structure
* Assess and prioritize born-digital files to determine what to keep and preserve
* Check the health of existing digital files, such as running checksums
* Identify long-term digital storage needs following the 3-2-1 rule
* Monitor and update digital storage environments
* Add descriptions or create transcriptions to make audio and video recordings more accessible

## How to use this self-assessment with the Digital Readiness Toolkit

**Step One: Familiarize Yourself with the Digital Readiness Toolkit**

The Digital Readiness Toolkit is full of resources and key activities that can help you achieve your digital readiness goals, such as digitizing your collections, providing online access to materials, determining licensing and copyrights, and caring for digital collections long-term. It’s not necessary to read the Toolkit in full to get started, but it is recommended to get to know its layout and some of its resources before you take this self-assessment survey.

**Step Two: Complete the Audiovisual Digital Readiness Self-Assessment Survey**

The three parts of the survey begin with general questions that help you to think about how digitally ready your organization is, and then focus in to help you to plan for, then reflect on specific projects. You may find yourself returning to your survey answers over the years to assess and document your progress as well as develop grant narratives to support long term goals.

1. **Part One:** **Narrative Assessment** is designed to help you define how digital readiness fits into your overall mission and help you brainstorm a preliminary list of digital projects that further that mission.
2. **Part Two:** **Focus Area Assessment** walks you through seven focus areas that the Digital Readiness Toolkit defines as important considerations to becoming digitally ready. Completing this section helps you identify your current strengths and challenges so that you can address them when you plan your digital projects in more detail.
3. **Part Three:** **The Pathway to Digital Readiness Plan** is where you synthesize your answers and discoveries from Parts One and Two. Here you will narrow down and identify your priority digital project or projects from your list in Part One and prepare to create a detailed work plan.

**Step Three: Fill Out the Digital Project Planning Worksheet**

Once you have defined a priority digital project, use the Digital Project Planning Worksheet to create an outline, workflow, and budget for your digital project. Return to the Digital Readiness Toolkit and identify and consult the resources that relate specifically to your project.

**Step Four: Put It all Together**

Once you have gone through the entire process above, you will have the following:

* A Narrative Assessment that describes where your organization is in its digital readiness mission and how you would like to advance.
* A Focus Area Assessment that defines your strengths and challenges.
* A Pathway to Digital Readiness Plan that lists your goals and priority digital projects that will build upon your strengths and address your challenges.
* A list of resources in the Digital Readiness Toolkit related to your goals.
* A completed Digital Project Planning Worksheet, which will help you turn your digital project ideas into concrete plans with a timeline, workflow and budget.

You'll then be ready to start your digital project!

## Tips for taking the Audiovisual Digital Readiness Self-Assessment Survey

*Overall this survey was an uplifting experience and raised my spirits! It enabled me to identify my strengths and anxieties regarding copyright and long-term records management and preservation*. - James Scott, Archivist, Sacramento Public Library

The Audiovisual Digital Readiness Self-Assessment Survey is not a test – it is a process of self-discovery, reflection, and learning. There are no right or wrong answers. If you are unsure of what a term means, the Toolkit Glossary can help. If you are unsure of what a question means, answer it the best you can and make a note to yourself to return to that question later.  It is ok to answer a question with “I don’t know”; challenging questions are flags that let you know where you can improve or where you need more information. Note any questions that you had trouble answering– this indicates an area that you can improve upon as part of your digital readiness mission. If you feel overwhelmed or have more questions than you do answers, jot them down in a separate document, set them aside for the time being, and continue with the survey. As you move through the process and use the suite of digital readiness resources, you will find that concepts that were challenging or unclear at the start of the project begin to make sense.

Some of the questions are similar to those in the [Digital Project Planning Worksheet](https://pressbooks.pub/drtoolkit/chapter/appendix-a-digital-project-planning-worksheet/), but try to complete this self-assessment survey with A/V collections in mind. You may write about your organization’s mission statement in the Digital Project Planning Worksheet, but describing it in this self-assessment with an eye towards how that mission statement applies to your A/V collections will help you focus on the most appropriate A/V projects.

**Plan to spend about two to four hours completing the entire survey.** The more time and detail that you put into the survey questions, the better prepared you will be to plan and carry out digital projects.

“This survey is an opportunity for candor.” - Sean Dickerson, Archivist, The African American Museum and Library at Oakland

The survey is most successful if you reach out to a variety of staff and stakeholders to answer the survey questions collectively. We encourage the use of the survey as an opportunity to gather and organize existing knowledge and documentation that may be in disparate places. Even if you believe you know the answer to a question, approach it with a sense of curiosity; many survey takers find out new information about their collection during the process.

The survey asks you to estimate the number of items and formats in the collection. Do your best to estimate without counting every item. If you find that you are spending more time counting items than you are reflecting on your digital readiness goals, that’s a sign to refocus. Create the best estimate that you can with the information you have– any estimate will create a foundation for planning. You can always go back to the question and revise an estimate later.

It is recommended to revisit and retake the Audiovisual Digital Readiness Self-Assessment Survey every one to three years to track your progress and re-evaluate your digital readiness goals.

## Part One: Narrative Assessment

1. Your organization

This section addresses the organization or group which holds the collections. Use this section to define or reflect upon your mission and how digital readiness fits into that mission. Define “organization” in a way that works for you. If sections of your organization have different missions, feel free to include multiple mission statements.

1. Does your organization have a mission statement?  If yes, please add below.
2. If your organization does not have a mission statement, please include a one to two sentence description of your organization’s primary objectives.
3. Does your organization’s mission include analog and digital audiovisual materials specifically?
4. If no, please describe your organization’s primary objectives for **digital** collections.
5. If no, please describe your organization’s primary objectives for **analog** collections.
6. Why is your organization interested in enhancing your digital readiness? How will becoming more digitally ready serve the mission of your organization?
7. What digital readiness concepts would your organization’s staff and volunteers like to be more informed about? (Do your best to rank in order of priority, 1- 11.)

\_\_\_\_\_\_\_\_\_\_How to digitize analog audiovisual materials

\_\_\_\_\_\_\_\_\_\_What analog audiovisual materials to digitize first

\_\_\_\_\_\_\_\_\_\_How to fund digital projects

\_\_\_\_\_\_\_\_\_\_How to store digital files long term

\_\_\_\_\_\_\_\_\_\_How to organize existing or new digital files

\_\_\_\_\_\_\_\_\_\_What to do with incoming digital collections

\_\_\_\_\_\_\_\_\_\_How to share digital files internally or externally

\_\_\_\_\_\_\_\_\_\_How to track and catalog digital files

\_\_\_\_\_\_\_\_\_\_Copyright issues around sharing digital collections

\_\_\_\_\_\_\_\_\_\_Privacy issues around sharing digital collections

\_\_\_\_\_\_\_\_\_\_Other (please name and describe):

1. Audiovisual Collections

This section helps you to think about what types of analog and digital audiovisual materials you have in your collection, and what content they contain. Please note: If you are not sure of what formats or content you have, the Toolkit provides resources for creating an inventory in [Appendix C](https://pressbooks.pub/drtoolkit/chapter/appendix-c-audiovisual-collection-inventory-and-instructions/). If you do not have detailed information about your collection for now, do the best that you can with the information that you have, and consider creating an inventory of the audiovisual items as preparation for digital readiness.

1. Describe the content of your analog and digital audiovisual collection. Write a list of series, subcollections, or other groupings you use to identify collections if you have that information.
2. Do you have any unidentified content in your collection? If so, describe.
3. Approximately how many of each audiovisual media format below does your organization have? Do your best to estimate. (The Toolkit provides resources for [identifying audiovisual formats](https://californiarevealed.org/sites/default/files/2018AudiovisualFormats.pdf).)

* **Film**
  + 35mm \_\_\_\_\_
  + 16mm \_\_\_\_\_
  + 8mm \_\_\_\_\_
  + Super-8mm \_\_\_\_\_
  + Other: \_\_\_\_\_
* **Video**
  + Open Reel Video Tape (2”, 1”, ½”) \_\_\_\_\_
  + Video Cassette (U-matic, Betacam, Betamax, VHS, Video 8, etc) \_\_\_\_\_
  + Digital Videotape (D1, DVCAM, MiniDV, Digibeta, etc) \_\_\_\_\_
  + Optical Media (DVD, DVD-R, Blu-Ray, Video Disc) \_\_\_\_\_
  + Other: \_\_\_\_\_
* **Audio**
  + Audio Wire Recording \_\_\_\_\_
  + Grooved Audio Disc (LPs) \_\_\_\_\_
  + Open Reel Audio Tape (½” ¼”) \_\_\_\_\_
  + Compact Audio Cassette \_\_\_\_\_
  + Digital Audio Tape (DAT) \_\_\_\_\_
  + Optical Media (CD, CD-R) \_\_\_\_\_
  + Other: \_\_\_\_\_
* **Digital Files**
  + Digital Audio Files \_\_\_\_\_
  + Digital Video Files \_\_\_\_\_

1. Digital Storage

This section describes your organization’s current method for storage of digital audiovisual collections.

1. How much data storage do you currently need for your digital audiovisual collections? Estimate in GB or TB if you are able to.
2. Do you have a documented, consistent plan or workflow for the long-term storage of digital audiovisual files? If so, describe it.
3. Which of the following digital storage methods do you use, if any?

* Stand alone hard drives
* Computer hard drives
* Thumb drives
* Network servers
* Cloud storage services
* Other (please name):

1. Does your organization have a backup system for your digital audiovisual files? If so, please describe.
2. Does your organization have a person or IT department who is responsible for managing digital storage? If so, who is it?
3. Access

This section addresses how your organization and its constituents access your audiovisual collections. Use this section to begin thinking about any areas that you would like to change, improve, or establish digital access.

1. How are your audiovisual collections currently accessed internally? (If no access is available, note that here).
2. What is your goal for internal access to your audiovisual collections?
3. How are your audiovisual collections currently accessed externally? (If no access is available, note that here).
4. What is your goal for public access to your audiovisual collections?
5. What digital access topics would you like to improve upon or learn more about (Rank in order of priority, 1-5)?

\_\_\_\_\_How to stream video or audio for the public

\_\_\_\_\_How to provide an online catalog of materials for external use

\_\_\_\_\_How to allow users access to digital materials offsite

\_\_\_\_\_How to allow users access to digital materials onsite

\_\_\_\_\_Other (please name and describe): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Intellectual Control

This section addresses the level of intellectual control (inventory information, cataloging information, and related documentation) the organization has over its collection.

1. Do you have an item level inventory of your audiovisual collections? If yes, what system or format is it in (for example, excel, TMS, Word, paper document, etc.)
2. Do your physical items have unique identifiers, accession numbers, catalog numbers, or other? If so, please describe.
3. Does your organization use a consistent file naming structure for your digital collections? If so, please describe.
4. Do you have a system for locating your analog collection items? If so please describe (for example, shelf numbers, barcodes, unique location numbers, etc.)
5. How do you find digital files in your collection? Please describe.
6. Rights

This section addresses the legal rights and copyrights of your audiovisual collection. Use this section to define areas in which improved rights information will help you to achieve your digital readiness goals.

1. Does your organization know the copyright status of your audiovisual collection?
2. Does your organization own the copyright to any portion of your audiovisual collection? What parts?
3. Are there cases where the unknown copyright status of your audiovisual collections prevents you from moving forward with digitization and preservation projects?
4. Does your organization have a process for limiting access to sensitive materials, personal materials, or materials with cultural restrictions? If no, would this be helpful for you?
5. Does your donation form include language that gives your organization rights to preserve, stream, or provide re-use of donated materials?  If no, is it a priority for you to develop such a process or policy as part of becoming digitally ready? (If your organization does not have a donation form, see the [Plan and Prioritize section](https://pressbooks.pub/drtoolkit/chapter/plan/) of the Digital Readiness Toolkit for instructions on creating one.)

1. Define Digital Projects

In this section, you will begin to brainstorm ideas for digital projects that support your digital readiness goals, based on your survey answers.

Review the list of digital project example types below. List as many specific projects under each heading that you can think of. Use your previous answers in the survey to generate ideas. If you do not have a project for a heading, skip it.

* + Digitize analog audiovisual assets such as films or magnetic media (list specific collections that are a priority for you)
  + Migrate digital files from optical media, such as DVDs or CDs, to more stable storage
  + Reformat digital files from their original formats to a preservation standard (i.e. non proprietary formats)
  + Transcode or edit files so they can be used for different purposes, such as for editing or streaming
  + Create and implement a digital file naming structure
  + Assess and prioritize born-digital files to determine what to keep and preserve
  + Check the health of existing digital files, such as running checksums
  + Identify long term digital storage needs following the 3-2-1 rule
  + Monitor and update digital storage environments
  + Add descriptions or create transcriptions to make audio and video recordings more accessible
  + Other (please specify)

Of the projects you listed above, what would you consider the top five priority projects as of right now? (You can always change your answer)

1.

2.

3.

4.

5.

1. Narrative Survey Reflection and Summary

Go back through all of Section One and briefly review your answers. List any questions here that you were unable to answer or concepts that were unclear to you that you would like to come back to. Note any major issues or themes that emerged as you filled out the Narrative Assessment.

## Part Two: Focus Area Assessment

In the first part of the survey, you reviewed your organization’s big picture activities and defined your digital readiness goals. In this section, you will look at specific key activities that help you to meet those goals. As you go through the key activities, you will get a sense of where your organization's strengths and challenges are, and you will generate a list of specific activities that will support you in advancing your digital readiness.

This section is divided into seven Focus Areas. Each Focus Area is divided into bronze, silver, and gold sections containing the key activities. In each section below, check off the box next to the activity that best describes what your organization has done or is in the process of doing. At the end of each focus area is a summary section where you will self-define as bronze, silver, or gold in each category. Then list the key activities that feel like a high priority for you to complete.

These key activities are a bit more detailed than what you’ll find in the Focus Area sections of the Digital Readiness Toolkit. They cover the same ground but more carefully, so that your organization can fully assess its place in the Digital Readiness Levels.

This is not a test. The point is not perfection. This is an exercise for self-reflection and discussion so that your organization can have better clarity on next steps. No organization is expected to have all or even most of the key activities completed. Be mindful to not get stuck on exactly what activities are right for you at this stage. Make your best educated guess and work collaboratively. You can always go back and revise your answers.

**Focus Area 1:  Plan and Prioritize**

Digital projects can be more complex and take more time than you may expect. It’s helpful to start small, set realistic goals, and define roles and tasks in advance. In other words, develop a plan to guide your work.

Select the activities your organization has completed:

**Bronze Level (Lay a Strong Foundation): Key Activities**

* Articulate your organization’s goals for digital work.
* Assess collections for digital projects.
* Identify digital projects, such as:
  + What level of inventory is appropriate for the collection
  + Digital storage development
  + Target preservation formats
* Identify potential project partners, stakeholders, and community resources that can support your projects.
* Identify existing resources, as well as resources that need to be acquired for:
  + Funding
  + Staff
  + Equipment
  + Content Management
  + Digital Storage

**Silver Level (Put into Practice): Key Activities**

* Define foundational projects that need to take place before your digital project, such as:
  + Collection inventory and assessment
  + Digital storage planning
* Prioritize a digital project.
* Acquire/gather resources needed to support your digital project plan.
* Get input from project partners and stakeholders as you develop the plan and keep partners informed throughout the process.

**Gold Level (Refine and Sustain): Key Activities**

* Create a detailed plan for a high-priority digital project.
* Gather ideas and examples of digital collection development policies.
* Draft a digital collection development policy and obtain feedback from stakeholders.
* Finalize and adopt the policy.

**Summary of Focus Area 1:  Plan and Prioritize**

What level would you describe your organization (Bronze, Silver, Gold)? Why?

List one or two key activities in this focus area that are a high priority for you.

**Focus Area 2: Obtain Permissions**

Determining the copyright status of the digital materials you will make available online can seem daunting, but there are tools available to help you assess your organization’s risks and responsibilities. Before you get started, think about the following:

* Owning a physical item does not necessarily mean you hold the copyright to that item.
* Digitizing an item does not change its copyright status or create a new copyright.
* Regardless of copyright status, there may be ethical and privacy considerations about how items are displayed or used.

Select the activities your organization has completed:

**Bronze Level (Lay a Strong Foundation): Key Activities**

* Adopt a deed of gift form that includes language about online access to digitized and born-digital content or update existing deed of gift form.
* If creating new digital content, such as oral history interviews, use a permission form that includes language about online access or update existing permission form.
* Identify existing documentation that may inform copyright permissions: deeds of gift, donor permission forms, or correspondence with donors.
* Identify items not covered by copyright (in the public domain).

**Silver Level (Put into Practice): Key Activities**

* Gather existing documentation that may inform copyright and permissions: deeds of gift, donor permission forms, or correspondence with donors.
* Identify items not covered by copyright (in the public domain).
* Review items to determine whether privacy, ethical, or cultural considerations will determine appropriate access.
* Make determinations about appropriate access to items covered by copyright and in the public domain.

**Gold Level (Refine and Sustain): Key Activities**

* Use standardized rights statements or Creative Commons licenses to describe the copyright status of digital items.
* Develop a conditions of use statement.
* Develop a takedown policy.
* Develop a statement or notice about potentially harmful content.

**Summary of Focus Area 2:  Obtain Permissions**

What level would you describe your organization (Bronze, Silver, Gold)? Why?

List one or two key activities in this focus area that are a high priority for you.

**Focus Area 3: Digitize**

Digitization is the process of making a digital copy of a physical object -- for instance, scanning a document, using a digital camera to photograph an artifact, or converting an audiocassette recording into a WAV file. Another common term for this process is reformatting.

Your goal here is to create a digital file that represents the original item as accurately as possible, using recognized standards that will keep the file usable for years to come. Keep in mind that this digital file will need ongoing care and storage, just as proper care and storage is still needed for the original physical object (See the Store and Maintain section of the Toolkit for more on caring for your digital files).

Select the activities your organization has completed:

**Bronze Level (Lay a Strong Foundation): Key Activities**

* Determine if the project will be done in-house or outsourced to a vendor.
* Identify target file format specifications, including resolution, bit depth, sample rate, wrapper, encoding, and other standards you will need to digitize materials.
* Adopt a file naming convention and document it.
* Prepare a project plan or statement of work.
* Estimate digital storage needs for materials you will digitize.

**Silver Level (Put into Practice): Key Activities**

* Prepare physical materials for reformatting.
* Complete a pilot project. Digitize a handful of items to check quality of digitized files and make sure selected standards will give you the results that you want.
* Document your workflow. Create a step-by-step outline of your digitization procedures.

**Gold Level (Refine and Sustain): Key Activities**

* Develop a list of quality control guidelines.
* Determine who is responsible for quality control.
* Use a log to track digitization work and quality control reviews.

**Summary of Focus Area 3:  Digitize**

What level would you describe your organization (Bronze, Silver, Gold)? Why?

List one or two key activities in this focus area that are a high priority for you.

**Focus Area 4: Describe**

Descriptive information about your digital content, called metadata, helps users find your items, understand their contents and origins, reflect on your community’s history and values, and make sense of how they may use the materials.

Select the activities your organization has completed:

**Bronze Level (Lay a Strong Foundation): Key Activities**

* Review the description gathered during the planning phase. Determine what additional metadata can be added, including more detailed content or technical information.
* Identify and/or create controlled vocabulary lists to use when creating metadata.
* Determine who is responsible for updating the inventory. Consider a [community-based inventory day](https://pressbooks.pub/drtoolkit/chapter/plan/#:~:text=Planning%20a%20Community%20Archiving%20Workshop%20for%20Audiovisual%20Materials).

**Silver Level (Put into Practice): Key Activities**

* Determine the [metadata standard](https://pressbooks.pub/drtoolkit/chapter/focus-area-4-describe/#:~:text=Identify%20and%20Adopt%20a%20Metadata%20Standard) that you will use and how the metadata fields apply to your collections.
* Inventory: create metadata for items.
* Update existing metadata.

**Gold Level (Refine and Sustain): Key Activities**

* Create a data dictionary to document the standards you will use for metadata.
* Create standardized, text-based, metadata records to store with your files.

**Summary of Focus Area 4: Describe**

What level would you describe your organization (Bronze, Silver, Gold)? Why?

List one or two key activities in this focus area that are a high priority for you.

**Focus Area 5: Share**

This section is all about access. Who will access the digital content you’re creating or acquiring? Where and how will they access it, and for what purpose? The appropriate level of access may vary depending on the content. You might share some items openly online with no restrictions. Other materials might be made available to certain researchers on-site only, due to copyright considerations, cultural protocols, or other factors.

Select the activities your organization has completed.

**Bronze Level (Lay a Strong Foundation): Key Activities**

* Review options for providing access to digital content via a content management system (CMS) or other access platform.
* Choose access options that meet your needs and goals.

**Silver Level (Put into Practice): Key Activities**

* Add digital collection items and related metadata to your content management system (CMS) or other access platform(s) .
* Identify partnership opportunities to make your items more widely discoverable.

**Gold Level (Refine and Sustain): Key Activities**

* Create and provide alternative text descriptions for all visual images shared online.
* Create and provide searchable full text for all text materials shared online.
* Create and provide transcripts or captions for all audio and video recordings shared online.
* Engage in new partnerships that help make your items more widely discoverable and encourage use.

**Summary of Focus Area 5: Share**

What level would you describe your organization (Bronze, Silver, Gold)? Why?

List one or two key activities in this focus area that are a high priority for you.

**Focus Area 6: Store and Maintain**

The activities in this section of the Toolkit will help put your organization in a position to manage your digital content over time, across generations of technology, so that the files you create or collect today can be opened and used 5, 10, or 50 years from now.

Select the activities your organization has completed:

**Bronze Level (Lay a Strong Foundation): Key Activities**

* Create a [collection-level log](https://pressbooks.pub/drtoolkit/chapter/appendix-d-collection-level-log/) to document existing and incoming digital collections.
* Review and assess current storage methods and locations, including servers, hard drives, thumb drives, etc.
* Confirm digital storage estimates for materials you have digitized and plan to digitize.
* Review existing digital collections and determine what digital projects are needed. For example:
  + Move files onto long term storage or off of unstable hard drives
  + Create reference files for playback
  + Rename files according to a standard naming convention
  + Develop a long term digital preservation strategy
  + Determine what digital materials should be kept
  + Determine how you will check the integrity of your digital files (fixity)
  + Transcode proprietary file formats to an open source file format

**Silver Level (Put into Practice): Key Activities**

* Determine at least one location within your organization where you will store a copy of each digital object - including the preservation master and access copy - and its related metadata.
* Determine at least one location off-site where you will store a copy of each unmodified primary file and its related metadata.
* Move copies of files to their storage locations.

**Gold Level (Refine and Sustain): Key Activities**

* Develop a best practice storage plan for digital materials, including backup and long-term storage.
* Document your storage decisions. Where is it? Who can access it? How?
* Document procedures used for any file checking tools and perform checks on a regular schedule.
* Implement best practice storage plan for digital files.
* Create a schedule and workflow for checking storage locations at least annually.

**Summary of Focus Area 6: Store and Maintain**

What level would you describe your organization (Bronze, Silver, Gold)? Why?

List one or two key activities in this focus area that are a high priority for you.

**Focus Area 7: Evaluate**

As you move through the Digital Readiness Levels, take time to review and reflect on your work on a regular basis. Evaluation is both outward-looking -- how is our work making a difference for our users and our community? and inward-looking -- what have we learned? How can we improve or evolve our work?

Although this section comes last in the Toolkit, evaluation is best approached as an ongoing mindset. Continually refer back to the core “Check as You Go” questions in the Digital Readiness Levels:

* Is it documented?
* Is it sustainable?
* Is it appropriate, relevant, and/or accessible?
* Is it working?

Select the activities your organization has completed:

**Bronze Level (Lay a Strong Foundation): Key Activities**

* Define stakeholders such as administration, funders and community members.
* Define user groups and their information needs.
* Develop outreach ideas, plans, or strategies.

**Silver Level (Put into Practice): Key Activities**

* Gather information about how your collections are being used, such as research inquiries or reproduction requests.
* Consider using tools such as Google Analytics or Facebook Page Insights to gather data about views and searches.
* Check in with stakeholders, gather feedback, survey.

**Gold Level (Refine and Sustain): Key Activities**

* Document lessons learned and ideas for how to apply what you’ve learned to future projects.
* Connect and collaborate with other practitioners engaged in digital work.
* Implement stakeholder feedback with new programs or projects.

**Summary of Focus Area 7: Evaluate**

What level would you describe your organization (Bronze, Silver, Gold)? Why?

List one or two key activities in this focus area that are a high priority for you.

## Part Three: Pathway to Digital Readiness Plan

In this section, you will review and synthesize your findings from the first two sections. You will use this section to:

* Define your digital readiness mission
* Create a list of digital projects that will help you to achieve your digital readiness mission
* Choose one to three digital projects as high priority and move onto the planning stage for the project(s) using the Toolkit

Define a Digital Mission Statement

In this section, you will use your survey responses to create or revise a digital mission statement. You can use the following prompts to create the statement, and you can see examples of other digital mission statements in the [Plan and Prioritize](https://pressbooks.pub/drtoolkit/chapter/plan/#:~:text=Digital%20Mission%20Statement%20Examples) section of this Toolkit.

Digital Mission Statement prompts:

* How does digital readiness support the overall mission of your organization?
* How does digital readiness improve access?
* How does digital readiness support your community?
* How could digital readiness expand opportunities for programming or education?

Define Strengths and Challenges

Consider resources that you already have that can support a digital project. Consider how you can build community and support into a digital project.

What are the greatest strengths in digital readiness for your organization? Consider existing equipment, access to education, staff knowledge, completed digitization projects, a trusted vendor, digital storage space, resources in your community, etc. Try to list at least three strengths.

What are the greatest challenges in digital readiness for your organization? Consider lack of equipment, expertise, and available resources, etc.

Focus Area Summary

Go back to each summary you wrote for each of the seven focus areas in Part Two: Focus Area Assessment. Below you will list the key activities that you named as a priority in each Focus Area.

Under each Key Activity:  
Describe how the activity specifically relates to your organization. (1-2 sentences)  
Describe why the activity is a challenge. (1-2 sentences)

Example

*Key activity: Create a* [*collection-level log*](https://recollectionwisconsin.org/wp-content/uploads/2022/06/Appendix-B-Collection-Level-Log.pdf) *to document existing and incoming digital collections*

*We have digital recordings of all of our lectures from 2019 stored on hard drives. The hard drives are all stored in an office space. This is a challenge because we do not know what files are on what hard drives. If we create a log of these hard drives, we will know where the files are. We aren’t really sure what the protocol is for creating a log.*

Example

*Key Activity: Adopt a file naming convention and document it.*

*We have no file naming convention in place. No one is sure how to name files when they come in, and it’s hard to keep track of files. We could use guidance on how to create a file naming convention.*

**Focus Area 1: Plan and Prioritize - Key Activity**  
How does this activity relate to your organization?

What about this key activity is a challenge for your organization?

**Focus Area 2: Obtain Permission - Key Activity**  
How does this activity relate to your organization?

What about this key activity is a challenge for your organization?

**Focus Area 3: Digitize - Key Activity**  
How does this activity relate to your organization?

What about this key activity is a challenge for your organization?

**Focus Area 4: Describe - Key Activity**  
How does this activity relate to your organization?

What about this key activity is a challenge for your organization?

**Focus Area 5: Share - Key Activity**  
How does this activity relate to your organization?

What about this key activity is a challenge for your organization?

**Focus Area 6: Store and Maintain - Key Activity**  
How does this activity relate to your organization?

What about this key activity is a challenge for your organization?

**Focus Area 7: Evaluate - Key Activity**  
How does this activity relate to your organization?

What about this key activity is a challenge for your organization?

Turn the Key Activities into Digital Projects

Using the list above, name 1-3 high priority digital projects that you would like to complete in the next 1-2 years. You can simply list your top three Key Activities above, or you can decide to create a digital project that combines several related key activities. Give the project a name, such as the *Collection Inventory Project*, the *Digital Storage Planning Project*, or the *VHS Digitization Project*.



Plan Your Digital Project

In this section, choose one high priority digital project from the list above and create the outline of a plan for the project. This plan can help you get started on your project or seek funding to start the project. Once you have one project plan complete, you can create plans for your other priority digital projects as well.

**Our Current High Priority Digital Project is:**

Use the [Digital Project Planning Worksheet](https://pressbooks.pub/drtoolkit/chapter/digital-project-planning-worksheet/) and the Toolkit resources to create a detailed outline and budget for the digital project.

As you complete a Digital Project Planning Worksheet for your project, consider these questions:

1. Where will funding come for the project?
2. Who will the project serve?
3. What roles are required and do you know who will fill them?
4. What ways can you involve the community in the project (shared space or resources, learning opportunities, etc.)
5. What resources from the Toolkit will help you with your project?
6. Are there other resources that are not in the Toolkit that would help you with your project?