Recollection Wisconsin Digitization Initiative

Digital Project Planning Worksheet *(rev. 5/1/2024)*

Use this worksheet to plan your digitization project. It complements more detailed planning information in our *Digital Projects Toolkit* available at https://recollectionwisconsin.org/toolkit. *Consider this a document in progress – it's a place to record key decisions and components as your project evolves. You may not have all the answers at this point and that's ok!*

Your Information

Name:

Title:

Organization:

Date:

Project title:

Projected start date: Projected end date:

Any funding entities (list here):

New or continuing project:

Brief project description:

Section I. Plan and Prioritize

Why Digitize?

1. **What are your primary goals for this digital project?** *Choose up to three MOST IMPORTANT goals or objectives for your project.*

   - 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 (list below)

2. **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?*

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

Scope and Scale

1. **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.*

Priority	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	

24 points: High priority for digitization

12 - 17 points: Medium priority

6 - 11 points: Low priority

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

- Photographs, postcards, or other images

- Illustrations, posters or maps

- Slides or negatives

- Books or other printed texts

- Letters, diaries, or other handwritten manuscripts

- Audio-visual materials

- Born-digital materials

- Other (list below)

3. **Approximately how many of each item will be included in this project?** *Provide a rough estimate of each format and number of items.*

4. **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.)*

Resources and Roles

1. **What other resources will you need to successfully complete this project?**
   Identify all that apply.

RESOURCE	Is this in place?	If yes, briefly describe. If no, what do we need to do to move forward?
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 (image editing, text recognition)	Yes No N/A	
File and data storage (server, cloud storage, external hard drive)	Yes No N/A	
Other (list below)	Yes No N/A	

2. **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 not be filled or filled by the same person.* **Please identify your participating staff where indicated.**

ROLE/FUNCTION	ACTIVITY	Who's responsible?
Project Management	Monitors project plan, budget, and timeline	*Vicki Tobias, RW staff*
	Coordinates project team members	*Vicki Tobias, RW staff*
	Communicates with partners, vendors, and funders	*Vicki Tobias, RW staff*
Digitization	Organizes and prepare materials for digitization	**[host site representative]**
	Scans materials	RW student intern
	Performs quality control review on digital files	RW student intern
	Assigns file names	RW student intern
Metadata	Reviews copyright status and assign appropriate rights metadata	**[host site representative]** + RW student intern
	Determines metadata standards	RW staff
	Conducts research or provide context to describe items (subject expert)	**[host site representative]** + RW student intern
	Creates metadata	RW student intern
File Management	Installs and troubleshoots hardware or software	*Vicki Tobias, RW staff*
	Moves digital files to long-term storage locations	**[host site representative]** + RW student intern
	Regularly audits and updates storage	**[host site representative]**
Outreach	Promotes project to identified audiences	**[host site staff]**
	Responds to research and permissions requests	**[host site staff]**
	Collects analytics and user feedback	**[host site staff]**
Other		

Additional resources for this section

Digital Readiness Toolkit - Plan and Prioritize - https://pressbooks.pub/drtoolkit/chapter/plan/

Section II: Copyright and Permissions

1. **What is the copyright status of all items in this project?**

If the copyright status is . . .	Then . . .
No copyright in the United States – in the public domain	**PROCEED.** Describe how the public domain status was determined (i.e. publication date).
In copyright – our organization is the creator and copyright holder	**PROCEED.**
In copyright – copyright holder has granted permission to use	**PROCEED.** Make a note of when this permission was granted and where it is documented.
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.
Copyright Not Evaluated – have not yet reviewed copyright	**PAUSE.** Conduct copyright evaluation before digitizing or choose different content.

2. **Other than copyright, are there reasons any items in the collection should NOT be made available online?** *Consider the following:*

   ● 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, or otherwise upsetting scenarios

   ● Other (list below)

3. **Do any materials in the collection warrant closer consideration before sharing publicly online?**
   Consider a "harmful content statement", limiting public access to or not digitizing collections 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

   - Undisclosed personal information including medical, financial or legal information.

Additional resources for this section

Digital Readiness Toolkit - Obtain Permission - https://pressbooks.pub/drtoolkit/chapter/obtain-permission/

Section III: Describe

Metadata

- **Which metadata elements will you use to describe the items?** *Take a look at the metadata template – for Recollection Wisconsin participants, contact us.*

  To share your digital collection through Recollection Wisconsin, these fields are REQUIRED for each item:
  - TITLE
  - SUBJECT
  - TYPE
  - RIGHTS

ADDITIONAL metadata elements may include the following:

- CREATOR (author, photographer, etc.)
- DESCRIPTION
- DATE CREATED
- FORMAT
- DIMENSIONS (of physical item)
- LOCATION (community, county, state, country)
- NAME OF COLLECTION

- **Which metadata fields will you need to research or create before proceeding**? *Note them here.*

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. **We can also create a file-naming scheme for your project as requested.**

Additional resources for this section

Digital Readiness Toolkit - Describe - https://pressbooks.pub/drtoolkit/chapter/focus-area-4-describe/

Section IV: Store and Maintain

1. **Consider where you will store your digital files, both preservation and user copies.** *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 (list below)

2. **Calculate how much total storage space you will need for digital files.** *Estimate at the beginning of a project. Revise once the project is complete.*

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

3. **How often will you or staff members move digital files into the storage locations selected above?** *Weekly, monthly, annually, etc.*

4. **When you've completed this project, who will be able to access the digital files in long-term storage?** *Note staff titles or any logins or contact information needed for cloud storage providers or other offsite storage.*

Additional resources for this section

Digital Readiness Toolkit - Store and Maintain - https://pressbooks.pub/drtoolkit/chapter/focus-area-6-store-and-maintain/

Section V: Evaluate and wrap up

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

2. **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/use requests

   - Other (list below)

3. **With which audiences and by what medium (print, social, etc.) will you share your project success?** *Brainstorm a few publicity opportunities.*

4. **Project wrap up checklist:**
   - About text for project web page, project/collection title
     - CONTENTdm set up form – *for Recollection Wisconsin participants, contact us*

   - Return physical collection to its permanent location

   - Back up digitized items and metadata

   - Thank your partners, funding entities, staff

   - Plan your next project

   - Share your success!
     - Press Kit [link]

Additional resources for this section

Digital Readiness Toolkit - Evaluate - https://pressbooks.pub/drtoolkit/chapter/focus-area-7-evaluate/