



DIGITIZATION PROJECT PLANNING GUIDE

In any successful digitization project, there is more to consider than scanning alone. Gather the project's relevant stakeholders and include them in your planning. This guide will help you consider and address each step in the digitization process, from access to rights to long-term preservation!

PROJECT OVERVIEW

Project Name: _____

Goal

What are your goals for this project and how do they support your organization's mission?

Audience

Who is your intended audience for this project? What interest has been shown by this target group?

Barriers

What are potential challenges or obstacles to completing this project?

Resources

Assess the resources you have and what you would need in order to complete the project.

Resource	Notes	Cost	Have/Need?
Equipment (hardware & software)			
Staff			
Vendor			
Storage/Hosting			
Other			

In-house or Vendor?

Can you scan with the equipment you have in-house? _____

Does staff have the time and expertise necessary to digitize? _____

Is it more cost effective to use a vendor? _____

SELECTION

Scope

What is the scope of materials to be digitized? Is anything explicitly out of scope?

Selection Criteria

Are the items you are planning to digitize...	Yes?	No?
Frequently requested for access?		
Difficult to access in their current condition?		
Stable enough to be digitized without causing damage?		
Sufficiently described/cataloged to ensure access and discoverability?		
Unavailable digitally elsewhere (have not already been digitized by another group)?		

Formats

What formats are the materials to be digitized? Select all that apply.

- Microfilm
- Photographic slides or negatives
- Images (photographic prints, postcards, etc.)
- Unbound documents (manuscripts, letters, etc.)
- Bound material (books, scrapbooks, etc.)
- Audiovisual material (audio, video, motion picture film)
- Oversized material (maps, posters, blueprints, etc.)
- Newspaper
- 3D Objects
- Other: _____

Rights

What is the copyright status of the materials to be digitized?

- In Copyright
 - Copyright is held by your organization
 - Copyright is held by someone outside of your organization (contact for permission)
 - Copyright holder(s) unlocatable or unidentifiable
- No Copyright in the United States
- Copyright Undetermined

DIGITIZATION

Preparation

Do any items need conservation or physical intervention (e.g. disbanding, temperature acclimating) before digitization? If so, which items and what type?

Specification

If your project includes multiple media types or sizes, list values for each type being digitized.

Type (text, image, sound)	Resolution/Frequency (ppi, kHz)	Format (TIFF, PDF, WAV)	Bit Depth (1, 8, 16, 24, 48)

Post Processing

What type of editing (e.g. cropping, deskewing) will you be making? _____

What derivatives (e.g. production master, access copy) will you be making? _____

Filenaming

What is the filenaming convention you will use for the project? _____

Will master and access files have different filenames or suffixes? _____

Example filename(s):

Directory Structure

How will you organize your files during the project and in long-term storage (if different)?

OCR/Transcription

What will you use for creating searchable documents (OCR, transcription, etc.)?

Quality Control

Describe your quality control plan. Will you perform QC on everything or only on a portion (10%, 100%, other)? What parameters will be checked?

ACCESS

Cataloging

Does item-level metadata already exist for materials being digitized? _____

What metadata schema(s) will you be using? _____

What metadata elements(s) will you be capturing? _____

**If you plan on contributing to DPLA, Title and Rights metadata are required*

What controlled vocabulary(ies) will you be using? _____

Access & Restrictions

Are there any specific access restrictions on any of the material (such as PII, etc.)?

Are there any access restrictions on the project as a whole?

- Access within institution only
- Limited to specific IP addresses
- No restrictions

How will you provide access to the digital files? What preparation is needed to use this platform (training, purchasing licenses, etc.)?

Marketing

How will you promote this project (e.g. social media, exhibits, press release)?

How will you evaluate use and impact of this project (e.g. analytics, user surveys)?

PRESERVATION

Backup Plan

What long-term storage options will you use for your master files? Select at least two options.

- Local Server/Network
- External Hard Drive
- RAID Device
- Cloud Storage
- Other: _____

Where will backup drives be located? How will files be managed? Who has access?

Documentation

Once the project is complete, be sure to document pertinent information about the digital project.

ROLES, RESPONSIBILITIES, AND TIMELINE

Timeline

When do you plan to begin this project? _____

When do you plan to complete this project? _____

Are there any particular dates that may impact the timeline (exhibits, grant deadlines, etc.)?

Roles & Responsibilities

Role	Activity	Responsible Person(s)	Deadline
Project Management	Managing project timeline, budget, and documentation		<i>ongoing</i>
	Selecting, assessing, and prioritizing materials		
	Researching copyright and obtaining permissions		
Cataloging	Determining metadata schema and/or template		
	Collecting and creating descriptive metadata		
	Updating or creating finding aid		
Digitization	Preparing media for digitization		
	Scanning originals		
	Image post-processing		
	Creating OCR and/or transcription		
	Creating derivatives		
	Filenaming and directory nesting		
	Quality Control		<i>ongoing</i>
Digital Preservation & File Management	Creating checksums		
	Moving digital files to storage location(s)		
	Uploading digital files to access platform		
	Monitoring fixity over time		<i>ongoing</i>
	Migrating files over time, as needed		<i>ongoing</i>
Outreach & Marketing	Developing and implementing marketing plan		
	Responding to reference requests		<i>ongoing</i>
	Tracking use of collection		<i>ongoing</i>
Other			

NOTES:

Individuals with disabilities may contact the Michigan Department of Education ADA Coordinator to request an alternative format to these materials. Please visit www.Michigan.gov/ADA for a list of state ADA Coordinators.

Based on [Recollection Wisconsin Digital Project Planning Worksheet](#).

