Digitisation project planner, handbook and examples

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Digitisation Project Planner

Sheet 1. Where are we now?

This planner is designed to be printed at A3 size. You may write directly in the fields below or use post-it notes as part of a group exercise.

Idea

Describe your project idea in 100 words

Why do we want to do this project?
What is exciting about our project?
What does our end result look like?
What is our biggest ambition for the materials?
Have we looked at similar projects?

Project

What do we want to do and when?
How long will the project last? Is it ongoing?
Who are the stakeholders and do they share our vision?
Why are we best placed to deliver this project?

Materials

What materials are we digitising?
How many items? And what kind?
Where are the materials located?
Who owns them? Are they free to access?
Are there preservation, restoration, conservation or sensitivity concerns?
Do we have or need permissions to digitise the materials?
How will we share our materials?

Skills

_____ Project management
_____ Technical (equipment)
_____ Technical (software)
_____ Cataloguing
_____ Data entry and management
_____ Archiving
_____ Website
_____ Publication platform
_____ Publicity and engagement
_____ Other skills

Team

Who is leading the project team?
Who do we need to deliver the project?
Are they volunteers or staff? What role will they play?
Will they receive compensation?
How much time do they have?
Do we need more people or project partners?
Will they need or bring funding?

Audience & users

Who or what groups will benefit from our project?
How will we promote inclusion and involve a wider range of people?
How will people access our collections? On what devices?
How can we meet access and reuse needs (eg, disability access)?

Current funds

Also see 'Budget' on Sheet 2

Do we already have funds? Can deliver the project within this amount?
Do we need expert help?
Do we need to apply for funding?
What can we do without additional funding?
Do we have partner organisations who can help with resources?
Will our organisation make any cash or in-kind contributions?

Digitisation Project Planner

Sheet 2. What do we need?

This planner is designed to be printed at A3 size. You may write directly in the fields below or use post-it notes as part of a group exercise.

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Permissions

Do we need permission from our organisation to do the project and/or digitise the materials?
Do we need to clear rights in the materials before digitising? (Owners, donors, copyright, etc)
Does our project involve sensitive materials, children or young people under 18? If so, do we need additional permissions?

Digitisation

How will we digitise?
What equipment do we need? (scanners, cameras, photography lighting, sound recording devices)
Who will digitise the materials?
What standards, formats and resolution will we use?
What software do we need? (collections management system, digital asset management system, editing software)

Timeline

When will our project start and end?
Can we organise the work into stages?
Have we set aside time for activities like research, recruitment, procurement, training, rights clearance and cataloging?
How much time will we need for these activities?
Will we host any events or workshops, if so when?

Data management

What data is associated with the items?
Does it involve personal data that requires additional management?
How will we catalogue the digital materials?
What metadata standards will we follow?
How will we communicate any rights in the materials?
(eg, Creative Commons or RightsStatements.org labels in the metadata)
Do we need to update our policies on data and rights management?
Where will we back up or deposit the digital materials?

Publication & engagement

How will we make our digital materials available? (own website, Wikimedia Commons, Flickr Pro, GitHub, specialist or existing online archives)
How will we maintain the digital materials after publication?
What channels will we use to reach people? (social media, newsletters, workshops)

Budget

_____ Staff and recruitment
_____ Outsourced services
_____ Training
_____ Travel and expenses
_____ Event costs
_____ Publicity and promotion
_____ Equipment and/or software
_____ Data storage, cloud and other subscriptions
_____ Website costs and ongoing maintenance
_____ Cash contributions
_____ Non-cash contributions
_____ Other costs and/or contingency

Needs

What work we will do in-house and what we will outsource?
Anything else we need to consider?

Funding

What is the funding for?
What funders support this type of work?
How do our values align with the funder's priorities?
How much funding do we need?
What is the funder's application process and timeline?

Handbook
for the digitisation project planner

What is the digitisation project planner?

This handbook accompanies the digitisation project planner.

Use these notes as you work through the sections of the paper or electronic version of the planner to help you:

- define your project goals
- assess what resources you have available
- identify the scope of your project and create a budget
- create a plan to find the resources you need
- make a business case or prepare a funding application

The planner will take you through the steps needed to turn your digitisation idea into a defined plan. It can be used for projects of all sizes.

You can use the planner to brainstorm individually or as a group. Sheet 1 should take no more than two hours to complete. Sheet 2 may require additional research and brainstorming over a longer period.

You will also find completed examples of the planner at the end of this handbook.

↘ The planner, handbook and examples are designed to be printed at A4. You can download a larger version of the planner to be printed at A3. Alternatively, you can fill it out online using Google Sheets or download a version to complete using Microsoft Excel.

How to use the digitisation project planner

The fields in the planner will prompt you to be specific in your answers to the list of questions provided.

Sheet 1. Where are we now?

1 VISION
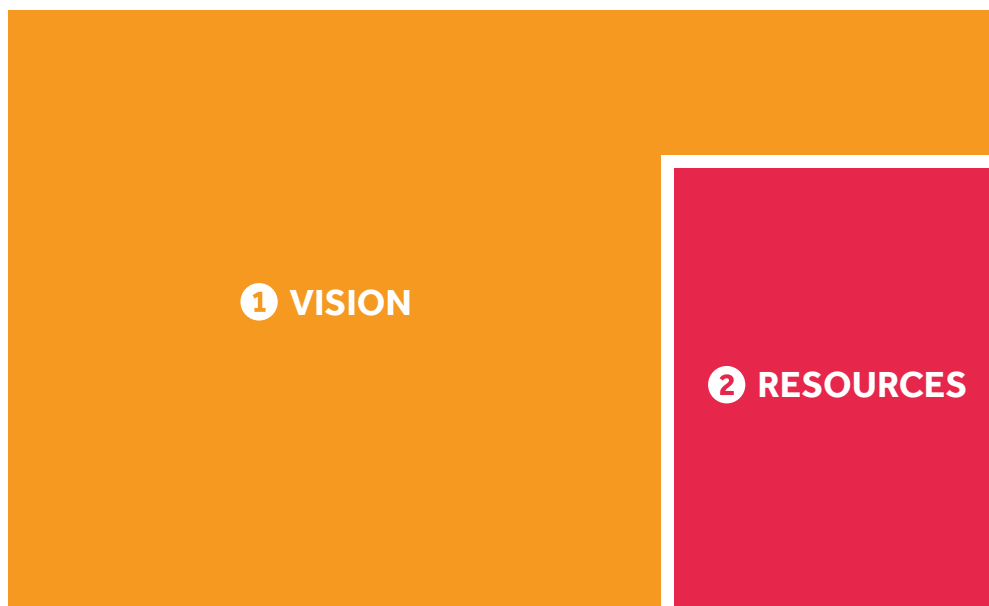
2 RESOURCES

This sheet helps you set out your **project vision** and review the **resources** you already have. Once complete, you will be ready to plan out the project in more detail and identify what you will need.

Sheet 2. What do we need?

3 PROCESS

4 RESOURCES
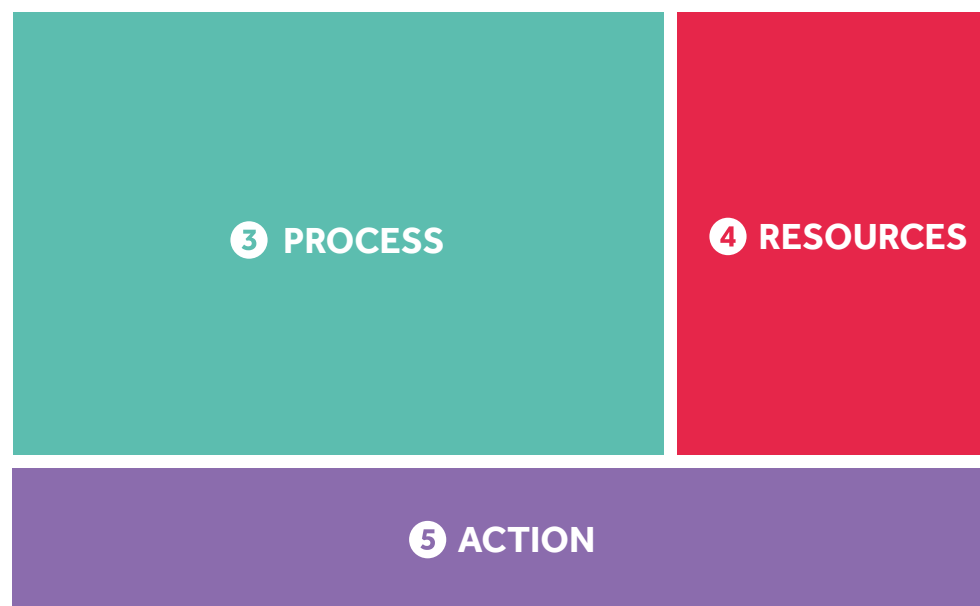
5 ACTION

This sheet helps you map out the **digitisation process** and determine the **resources** you will need to proceed. Review your answers from both sheets to make a list of **action points** and next steps.

Sheet 1. Where are we now?

Vision

Your vision for the project is the foundation that should inform all aspects of the work and future funding applications. Having a clear vision for your project will save you time and money down the road.

Idea

Describe your project idea in this field. Simply put, why do you want to do this project?

Project

Describe the core features of your digitisation project. List any content or activities your project will create, like digital reproductions, websites, events or toolkits. What do you want to do and when?

Materials

Describe the collections you would like to digitise and/or publish in this field. What materials are you digitising and why?

> ↘ **Your answers will shape the digitisation process and project costs. For example, if you need to travel to different locations, you must factor travel costs and time into your plan. You may also need to purchase portable digitisation equipment. By contrast, if you are working with an external digitisation partner, consider where the materials are and how your partner will gain access to digitise them.**

Team

List the people and partners who will work with you on the project in this field. Who will you need on your team?

> ↘ **Describe the people on your team in as much detail as possible. Are they existing staff? New partners? Volunteers? The public? This field will help you identify what resources you will need to support your project. Any substantial contributions to the project may require a letter of support.**

Audiences & users

Use this field to identify your audiences and user groups. Who will benefit from the project? How will you ensure they can access the digitised materials?

Think about specific groups within the general public. Think about:

- local community
- communities of interest
- people from or connected to a geographical area
- children and schools
- researchers
- the media

Notes

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Sheet 1. Where are we now?

Resources

You will need team members, volunteers, partners or contractors to help with the following areas. Alternatively, you might need to re-scope your project or break it up into these different parts of the digitisation process.

Skills

List the skills you already have on your team, or in your wider network of partners, to support the delivery of your project.

Can team members or partners help with:

- project management
- rights clearance and permissions
- technical equipment and digitisation
- software and editing
- cataloguing
- data entry and management
- archiving
- website
- publication platform
- publicity and engagement

Current funds

Review the current funds you can commit to your project. Include the contributions your project partners can make to your project.

Do you already have funds, and what can you do without funding?

↘ You may have enough resources to pilot your idea by digitising a selection of materials. It is a good idea to start small and scale up later. You will gain experience and insights during the pilot which will help you save time and costs in future iterations of your project.

Notes

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Sheet 2. What do we need?

Process

Your digitisation strategy is the heart of your project. The decisions you make along each stage of the digitisation process will shape your timeline and budget.

You may not have all the answers to the questions raised in this planner, and that is okay. Record it in the 'Need' category and you can return to it later.

Permissions

Use this field to note the permissions you may need at different stages of the project. Some should be obtained before submitting the funding application. Others will arise during the project and may shape your project's timeline and budget.

Also consider whether publishing project materials online or using open licences is appropriate. For example, the materials may be culturally sensitive or third parties may own rights in them.

↘ Have a look at The National Lottery Heritage Fund's guides on open licensing, GDPR and copyright.

Digitisation

Use this field to describe how you will digitise the materials (images, sound recordings, 3D objects, etc). Identify who will carry out the digitisation, any equipment or technology required, and the quality or formats needed.

↘ Think about your users when selecting standards, formats and image resolution. For example, what image resolution will help them make the most out of your digital collections?

Data management

Fill in this field with your data management plans. Digitisation produces a range of new materials like digital assets, metadata, datasets, workflows or other project outputs. Different data may require different approaches to data management, storage and publication.

If your project involves personal data, you will need to have a separate plan for data storage and rights management.

Consider: What information should be included in your metadata? What information will help users make the most of your digital collections? If additional funding is needed, have you read the funder's licensing requirements for project outputs? Where will you store your data?

Publication & engagement

Use this field to describe where and how you will publish your project's outputs, like images, audio, video, any datasets, toolkits or other outputs. You can even publish the materials on more than one platform to improve the project's reach, like Wikimedia Commons and Flickr. Also consider how you will share this information with the public, through press releases, social media or public events.

↘ Check whether the funder has any publishing requirements. For example, The National Lottery Heritage Fund requires all project outputs to be publicly accessible for between five and 20 years. Knowing this might inform which platforms you use.

Sheet 2. What do we need?

Resources

Your resources (time and money) should support your project idea and digitisation plan. Make sure your timeline and budget respond to the points you have noted in the Vision and Process fields.

Timeline

Now that you have an initial project plan, you can estimate a reasonable project timeline. Break your project into phases of work with distinct milestones, start and end dates.

You will need to estimate how much time each area of the digitisation work will take. If you struggle with this, you should ask for an expert opinion and/or carry out a small pilot project. Begin by asking how much is there to do in each area of work:

- research and scoping
- audit
- digitisation
- hardware and software procurement
- training
- cataloguing and data management
- events and workshops
- final delivery

Budget

You will need to estimate costs for key expenses. Use the checklist to itemise your project costs, as well as any cash or non-cash contributions provided by your organisation or project partners. You may need to do some more research or ask suppliers for quotes to firm up your costs.

> ↘ Cash contributions refer to money supplied to the project from your organisation or a project partner. Non-cash contributions include all other forms of support for the project, such as equipment, staff time, expertise, venue hire. You might also include a contingency cost between 5-10% of the total budget.

Checklist of costs

- ☐ Staff and recruitment
- ☐ Outsourced services
- ☐ Training
- ☐ Travel and expenses
- ☐ Event costs
- ☐ Publicity and promotion
- ☐ Equipment
- ☐ Software
- ☐ Data storage, cloud or other subscriptions
- ☐ Archiving service fees
- ☐ Service fees for self-hosted archives and materials
- ☐ Website costs and ongoing maintenance
- ☐ Accessibility checking
- ☐ Contingency
- ☐ Cash contributions
- ☐ Non-cash contributions

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Sheet 2. What do we need?

Action

Now that your digitisation project planner is almost complete, you can assess what you need to deliver the project and determine whether you will need external funding.

Needs

Use this field to make a list of any skills, contracts, equipment or other technology you will need to carry out the project.

⟶ This field can also be used to resolve some of the unanswered questions you have identified. Certain needs might impact the project's timeline or budget.

Funding

If you need additional funding to proceed with your project, make an action plan to write your proposal. This will help you write a business case for your organisation to fund the project.

If you need external funding, identify suitable funders by checking that your project fits well with any priorities and requirements they may have. As an example, review The National Lottery Heritage Fund's guidance on funding and priorities.

⟶ Check the funders' deadlines and assign action points to your team to develop your funding application. Agree on your ideal submission date and work backwards to set deadlines to produce key parts of the proposal, such as the first draft of the proposal, budget, gathering letters of support from partners and so on.

One final touch...

Now that your vision has a detailed plan, give your project a name to polish it off!

Notes

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Example A. Royal Albert Memorial Museum

Sheet 1. Where are we now?

Idea

The Royal Albert Memorial Museum and Art Gallery is working with The GLAM-E Lab at the Universities of Exeter and Reading on a pilot project to explore the potential of open access at the museum. To adopt open access we will need approval from the museum's governing body. To provide information to help make this policy change we are undertaking a trial. Our idea is to digitise paintings, drawings and other graphic works of historical sites in and around Exeter that are in collections cared for by the museum and are out of copyright. The architecture and landscapes depicted in these works have changed significantly over time, particularly due to the Exeter Blitz in World War II. Many no longer exist. The artworks are therefore important historical resources and records. We want people to be able to use them freely since they are some of the only surviving images, but we also want people to surprise us with how they use and remix them. We plan to use this set of images to explore open access and its benefits for the rest of the collection in collaboration with our project partner.

Project

We will photograph artworks at the Royal Albert Memorial Museum and Art Gallery in Exeter and make them available online through Wikimedia platforms, specifically Wikimedia Commons and Wikipedia. The project will last two years. Our project will produce five key outputs: (1) A digital collection of 63 public domain artworks, which will be uploaded to Wikimedia Commons (more to be identified later in the project); (2) A Meta-Wiki project page to help users find the digital collections and contribute to articles about heritage lost during the Exeter Blitz; (3) A Wikipedia Edit-a-thon with local historians and Wikipedia editors to crowdsource new articles and contributions; (4) A new dataset of images with additional data and information held by the Royal Albert Memorial Museum that will be published on GitHub for use by educators; and (5) An open access report on the experience and impact of the activities after one year.

Materials

- 63 public domain artworks at the Royal Albert Memorial Museum in Exeter
- Other materials identified later
- All artworks are held in trust by Royal Albert Memorial Museum
- We need staff support to facilitate digitisation activities
- We need support from Wikimedia UK on their platforms and features
- All collections managers have signed off on the project

Skills

Research assistant	Project management
External photographyer	Technical (equipment)
External photographer	Technical (software)
Assistant curator	Cataloguing
Assistant curator and Wikipedian	Data entry and management
Wikimedia Commons	Archiving
Comms team	Website
Wikimedia Commons	Publication platform
Comms team	Publicity and engagement
Open access support: glam-e Lab	Other skills

Team

The Royal Albert Memorial Museum and The GLAM-E Lab will lead the project. The project will primarily be supported by a Research Assistant and the museum's digitisation photographer. GLAM-E researchers will lead on rights clearance and open access. Two museum staff will support project activities: the Head of Collections and Collections Officer. Our team will work directly with another project partner Connected Heritage at Wikimedia UK via a Wikipedian-in-Residence.

Audience & users

Our project will benefit anyone interested in the arts and history of the Devon area. These might include historians, curators, researchers, teachers, creators, local communities or anyone working in local tourism.

Current funds

Our partnership has some funding from another project.

We need funding to cover the costs of any new digitisation. We need additional funding for:
- Wikimedia support and the Wikipedian-in-residence
- reasonable costs to support volunteers
- event costs

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Permissions

All artworks are held in trust by the Royal Albert Memorial Museum. We will only work with public domain artworks. This means all copyrights in the artworks have expired. Accordingly, no permissions are needed to digitise. This means we can meet the funder's requirement to publish the images as CC0.

Digitisation

All digitisation will occur on site at the Royal Albert Memorial Museum using their facilities. The external photographer will digitise the works using a DSLR camera. The raw files will be converted to TIFF and JPEG. We will decide on the best image resolution to use. Both formats will be uploaded to Wikimedia Commons.

Timeline

- Phase 1: project start, administration and data preparation (12 months)
- Phase 2: digitisation and publication (6 months)
- Phase 3: public activities, advertisement and edit-a-thons (6 months, spread out over the course of the project)

Workshops will occur at the end of year 1 and year 2

Data management

All digital images will contain descriptive metadata, like the Artist, Title, Object Type, Description, Depicted place, Date, Medium, Dimensions, Accession number and other information. We are using Excel templates designed for uploads to Wikimedia Commons to manage our metadata. In addition to uploading the data to Wikimedia Commons and GitHub, we will back up data using the "3-2-1 rule". This means we will keep 3 copies of our data in total with 2 copies stored on different devices (a computer and on the museum's shared drive) and 1 copy stored offsite (a separate hard drive in secure storage).

Publication & engagement

The digital images will be published to the museum's online collections website, Wikimedia Commons and GitHub to ensure that the widest range of local and global users can access and enjoy them. We will advertise the project through the MetaWiki page, through social media channels and press releases.

Budget

Externally funded	Staff and recruitment
Ask Wikimedia UK	Outsourced services
For 2 workshops	Training
For 2 workshops	Travel and expenses
Covered by museum	Event costs
Covered by museum	Publicity and promotion
Covered by museum	Equipment and/or software
Annual hosting fees	Data storage, cloud and other subscriptions
Covered by museum	Website costs and ongoing maintenance
Supported by glam-e Lab	Cash contributions
In-kind museum support	Non-cash contributions
10% of overall budget	Other costs and/or contingency

Needs

- Ensure all the necessary approvals for open access are in place before the project start
- Training on Wikimedia platforms for museum staff and volunteers
- Hard drives, long-term storage
- Acquiring digital asset management software to improve our collections interface
- Ask quotes for costs from Wikimedia UK for outsourced services and training
- Ask The GLAM-E Lab for their cash contribution to the project

Funding

The funding will support the costs of new digitisation, of Wikimedia UK involvement, the events and volunteer participation, and ongoing work on open access publications to Wikimedia Commons. See notes above in budget and get final costs from our partners and letters of support. Our plans to use CC0 and Wikimedia Commons are compatible with the funder's open licensing requirement.

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Idea

We have a collection of historical images of locations in the area which is partly digitised. We want to improve our website and make the material accessible to a wider audience online. The aim is to increase engagement in the archive from the people of our area, especially younger people and underrepresented individuals and communities. The aim is to foster a sense of community and an understanding of our shared intercultural history in the town. We have looked at a variety of other community websites and have noted those we like and investigated who supplies their software.

Project

We want to digitise the images and create a catalogue online. There will be links from images to a map of locations in the area. We want to encourage people to upload comments about the locations and their lived history of the area, and to send us their own images and comments for upload.

Materials

We have a number of images from people in the community, which are currently stored at the house of the project leader, or at people's homes. We will need to do an audit to list the materials that we have and to identify those which are in-copyright and where permissions need to be sought. We also need to organise a place to store hard copy items for the future (prints, artefacts, video tapes).

Skills

We need expert help on: project management of digitisation, technical equipment and software, cataloguing and data entry, choice of platform for web access.

We have skills in public engagement and publicity, and local history.

Project management
Technical (equipment)
Technical (software)
Cataloguing
Data entry and management
Archiving
Website
Publication platform
Publicity and engagement
Other skills

Team

The project leader is a local historian. A group of volunteers has been assembled to help on this project. One of the group has skills in photography so may be able to take the lead on digitisation.

Audience & users

Local communities
Schools
Older people with memories of the area
Researchers
The media

Current funds

None. We plan to apply to The National Lottery Heritage Fund.

Heritage Fund | glam-e lab

Permissions

We will divide the images according to the rights in them and our ability to meet the open licensing requirement. For images of living individuals, we will seek an exception in relation to the open licensing requirement. Wherever possible, we will ensure persons depicted also agree. For images in which copyright has expired, we will apply the CC0 tool. For in-copyright images, we will seek permission and encourage the use of CC BY 4.0 where appropriate (eg, images of buildings and landscapes without people in them). For images with unknown copyright status, we will use the Copyright Undetermined label for any orphan works. We need to create formal deposit agreements and consent forms, as well as a take down policy for instances where consent is withdrawn or personal data is involved.

Digitisation

We will get expert help in choosing a scanner and setting up a digitising workflow.

Timeline

We have created a timeline which aims for a launch of our new site nearly a year after project start.

Phases are: Full audit of material; Create Budget; Procure software; Install train and test; Permissions and agreements; Workshops with a specialist on Scanning, Digital file handling, Metadata and cataloguing, Workflow, Copyright; Repository for hard copy.

Data management

We will review the data we hold and look at the implications for data protection.

Publication & engagement

We will approach some suppliers of software for web archives, using these criteria: Have worked in the community archive sector; Handle image video and sound; Produce attractive and accessible modern design; Easy to administrate for volunteers; User friendly interface; Display boxes for galleries; Get involved section; Location map links to content; Easy to export collection and metadata; Helpful and responsive support; Affordable setup and ongoing costs; Affordable training. We will hold meetings to brief and inform potential project volunteers. At launch we will hold a public launch for the local community.

Budget

We need quotes for:
Domain name
Zoom account
Website Year 1
Website Years 2 and 3
Scanning
Back up drives and USB stick
Branding design
Printer ink and stationery
Storage boxes for hard copy
Travel
Launch event
Sundries
Also needed: expert help

Needs

We need guidance to set up and run the project from someone who has experience with community archives and can help us assess the various products and platforms on the market. We will ask the local museum if they might be a permanent repository for the hard copy items we have scanned.

Funding

Funding bid to The National Lottery Heritage Fund for budget items above with several days consultancy time included.

Image credits

Cover. A painted hand-made wooden model of "Noah's Ark", Herbert Art Gallery and Museum, CC BY-SA 3.0.

Page 1. The Annunciation, Sir Edward Burne-Jones, Birmingham Museums Trust, CC0 1.0 (image in reverse).

The Agony in the Garden, Bacchiacca (1494–1557), York Art Gallery, York Museums Trust, Public domain.

L'Amour Vainqueur (Cupid Victorious), William-Adolphe Bouguereau (1825–1905) (after), York Art Gallery, Public domain.

Page 3. Detail 1, Detail 2, Detail 3, Cartoons for "Christ in Majesty" in All Saints Church, Margaret Street, London (incomplete), William Dyce (1806-1864), Aberdeen Archives, Galleries & Museums, CC0 1.0.

Page 4. Suffragette Calendar, Herbert Art Gallery and Museum, Coventry, CC BY-SA 3.0.

Jenny Cameron (c. 1700-1790), Adventuress, supporter of Charles Edward Stuart, National Library of Scotland, Public Domain.

Necklace, Victoria and Albert Museum, CC BY 4.0.

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Portrait from 'The History and Antiquities of Boston' (Second edition), The British Library, Public Domain Mark.

Page 6. Pepsis heros (Fabricius, 1798), The Trustees of the Natural History Museum, London, CC BY 4.0.

The housemartin flea, Ceratophyllus Ceratophyllus hirundinis (Curtis, 1826), Olha Schedrina / The Trustees of the Natural History Museum, CC BY 4.0.

Page 7. Pin Head, artwork of the brain, Sarah Grice, Wellcome Collection, CC BY 4.0.

Purple medicine jar, Wellcome Collection, CC BY 4.0.