

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?

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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?