

KU Digital Initiatives – Checklist for Project Planning

This checklist outlines the general planning process for digital projects. Not every project undertaken will require all of the steps listed nor will these steps necessarily be carried out sequentially but may often be worked on in parallel. Additional steps may be required for particular projects.

- **Planning**
 - Establish project goals (desired results)
 - Decide on basic course of action
 - Identify stakeholders
 - Determine costs and funding
 - Identify skills and staff required
- **Select a collection for digitization**
 - Determine scope of digitization
 - i. Entire or subset?
 - Consider copyright issues and restrictions
- **Collection preparation**
 - i. Conservation assessment
 - ii. Develop treatment plan
 - iii. Perform necessary treatment
- **Review existing access aids** (catalog records, finding aids)
- **Develop plan for creating new access aids**, if needed
- **File naming and storage**
 - i. Follow Digital Initiatives File Naming Conventions
 - ii. Secure server space
- **Descriptive metadata**
 - i. Select appropriate metadata scheme
 - ii. Create metadata
- **Digital image production**
 - i. Determine formats for capture, archiving, display
 - ii. Determine physical size and special production requirements
 - iii. Develop digitization workplan
 - iv. Scan source material to master specifications
 - v. Create derivatives
 - vi. Create technical metadata
 - vii. Save master files
- **Quality control**
- **Structural metadata creation**
- **Full text, markup**
- **File management**
- **Integration of images and metadata**

- **Delivery/presentation**
- **Promotion**
- **Assessment**
- **Documentation**