PLANNING WORKSHEET

This worksheet will help you outline a plan that meets your needs. You don’t have to answer all the questions — only the ones that apply. If you have any questions, give us a call at 213-740-9263.

1. What kind of content needs digital preservation services? [check all that apply]

- Paper Objects
  - Books
  - Magazines
  - Pamphlets
  - Maps
  - Photos
  - Graphics
  - Documents
  - Other [describe] _______________________________________

- Media
  - Film
    - What format(s)? ____________________________
    - Do you know how many objects/file volume? ________
    - How old is the material – Less than 5 yrs old?
    - Do you have an inventory? ___________________
    - Do you have a catalog(s)? ___________________

- Data and other File Types
  - Databases
  - Digital Files
  - Medical Images
  - Other
    - Do you know how many objects/file volume? ________
    - What formats? ____________________________
    - What size(s)? ___________________________
    - How old is the material – Less than 5 yrs old?
    - Do you have an inventory? ___________________
    - Do you have a catalog(s)? ___________________

- Media
  - Video — Analog
  - Video — Digital
  - Audio — Analog
  - Audio — Digital

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2. File Management

- Are you using an asset management system – DAM, MAM, CMS, etc? __________________________
  - What application(s)? ________________________
  - What are you using it for now? __________________________
  - Will you use it to manage these files? _______________________

3. Storage

- Do you know the size or volume of the collection to be stored? ________________________________
- Are you planning to store the files in-house? ________________
  - Do you have an appropriate file management system? ________________
  - Do you have a reliable back-up system? ________________
- Are you planning to store the files off-site? ________________
  - Do you need to submit and retrieve files remotely? ______
  - Do you need rapid retrieval? ________________
  - Do you have an appropriate broadband connection ________________
- Do your storage needs have a known schedule or file retention plan? ________________________________
  - Is there a schedule to retrieve the collection? ________________
  - Is there a schedule to move the files from more accessible to less accessible status, or vice versa? ________________
  - Is there a file retention schedule to save or permanently delete files? ________________

4. Access

- How will the files be used? __________________________
  - Do the files need to be shared? ______________________
  - Will a set of them be needed often? ________________
  - Will a set of them be needed occasionally? ________________
  - Will a set of them be needed infrequently? ________________
  - Will a set of them be needed rarely? ________________
- How many users will there be? ________________
- Do you need to control access to these files? ________________
  - Various different levels of access ________________
  - Limited access ________________

5. Cost

- Do you have a budget already for all or part of these costs? __________________________
  - Do you need help drafting a budget? ________________
- Do you have funds already for all or part of these costs? __________________________
  - Do you need help drafting a fundraising plan? ________________

6. Special factors, other considerations, comments, etc.

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