

# 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
  - o What format(s)? \_\_\_\_\_
  - o Do you know how many objects/file volume? \_\_\_\_\_  
 \_\_\_\_\_
  - o How old is the material – Less than 5 yrs old?  
 5-10? 10-20? 20-50? Older? \_\_\_\_\_
  - o Do you have an inventory? \_\_\_\_\_
  - o Do you have a catalog(s)? \_\_\_\_\_

### Data and other File Types

- Databases
- Digital Files
- Medical Images
- Other
  - o Do you know how many objects/file volume? \_\_\_\_\_  
 \_\_\_\_\_
  - o What formats? \_\_\_\_\_  
 \_\_\_\_\_
  - o What size(s)? \_\_\_\_\_
  - o How old is the material – Less than 5 yrs old?  
 5-10? 10-20? 20-50? Older? \_\_\_\_\_
  - o Do you know the file sizes? \_\_\_\_\_
  - o Do you have an inventory? \_\_\_\_\_
  - o Do you have a catalog(s)? \_\_\_\_\_

- o What format(s)? \_\_\_\_\_  
 \_\_\_\_\_
- o Do you know how many objects? \_\_\_\_\_
  - How old is the material – Less than 5 yrs old?  
 5-10? 10-20? 20-50? Older? \_\_\_\_\_
  - What size(s)? All the same, or variable \_\_\_\_\_  
 \_\_\_\_\_
- o Do you have an inventory? \_\_\_\_\_
- o Do you have a catalog(s)? \_\_\_\_\_

### Media

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

## 2. File Management

- Are you using an asset management system – DAM, MAM, CMS, etc? \_\_\_\_\_
  - o What application(s)? \_\_\_\_\_
  - o What are you using it for now? \_\_\_\_\_
  - o 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? \_\_\_\_\_
  - o Do you have an appropriate file management system? \_\_\_\_\_
  - o Do you have a reliable back-up system? \_\_\_\_\_
- Are you planning to store the files off-site? \_\_\_\_\_
  - o Do you need to submit and retrieve files remotely? \_\_\_\_\_
  - o Do you need rapid retrieval? \_\_\_\_\_
  - o Do you have an appropriate broadband connection \_\_\_\_\_
- Do your storage needs have a known schedule or file retention plan? \_\_\_\_\_
  - o Is there a schedule to retrieve the collection? \_\_\_\_\_
  - o Is there a schedule to move the files from more accessible to less accessible status, or vice versa? \_\_\_\_\_
- o Is there a file retention schedule to save or permanently delete files? \_\_\_\_\_

## 4. Access

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

## 5. Cost

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

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

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