



# Guiding Digital Success



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## Introduction

Digitizing and making a collection of materials available on the Web is one of the most rewarding projects you'll ever work on. You'll find out more about the collection itself, how users want to interact with it and the digital technology involved. The learning process on a digitization project is often enjoyable and the end results will bring an enormous feeling of accomplishment.

The road to success, though, may seem endless if you don't know where to start. Taking a collection of materials successfully into the digital world requires planning and preparation, in addition to the production steps of such a project.

It often helps to take a step back and look at an outline of the entire project. That's what this guide is for—to provide a quick, simple overview of how to get a digitization project started, organized and completed. It can also be used as a learning tool, especially if this is your first time creating a digital collection.

You can create an important digital resource for your users. Your success starts with a little planning.

### TABLE OF CONTENTS

.....	
<b>Stage 1: Plan your digital collection program</b>	<b>2</b>
.....	
<b>Stage 2: Develop your digitization project</b>	<b>3</b>
.....	
<b>Stage 3: Prepare and digitize materials</b>	<b>4</b>
.....	
<b>Stage 4: Set up computer hardware and software</b>	<b>5</b>
.....	
<b>Stage 5: Test and build your digital library</b>	<b>6</b>
.....	
<b>Stage 6: Launch!</b>	<b>7</b>
.....	
<b>Conclusion</b>	<b>8</b>
.....	
<b>Appendix</b>	<b>9</b>
.....	
<b>About OCLC/About OCLC Digital Collection Services</b>	<b>11</b>

## Stage 1: Plan your digital collection program

Beginning your project by creating a plan is an important first task. The steps below will help you lay a solid foundation for your digital collection program. By working through them, you'll build a stronger program and have a clearer vision of it.

- ❑ **Consider your organization's strategic plan.** If appropriate, also consider those of your parent institution and consortium. Develop your program's goals and objectives, making certain they support your organization's vision, values and mission. Remember, your mission and goals should be the basis of all future decisions.
- ❑ **Identify stakeholders within your organization.** Stakeholders may include staff, major contributors, volunteers and end users. Talk with your key stakeholders and find out what's really important to them. Gaining their support for your project will increase its potential for success.
- ❑ **Establish a cross-functional team.** Your team's initial task will be to articulate and interpret policies on collection development, metadata, security, preservation and access. Members of your team should bring to the project some key skill sets, including subject specialty, cataloging or metadata creation and technical systems support.
- ❑ **Establish a budget.** The major cost components of any digital library project are: staff time, training, documenting and reporting, operations and supplies, software and hardware, maintenance, conversion costs and data storage costs.
- ❑ **Consider the funding needed to start and sustain your digital program.** Begin by determining how much funding is needed. Then look into available grants and donations from organizations that fund digitization projects at the local, state and national level. Also, consider students, interns or volunteers to help with some of the project tasks.
- ❑ **Document your plan.** Taking the time to write down a plan is a great way to pull all your ideas together and share them with others. A plan should be an active document used by management and staff alike to guide activities and collect real-time data regarding costs and resource requirements for specific tasks.

### Stage 1 – Learn More

**Digital collection planning.** For a good example of a digital library plan, view “BUILDING THE PENNSYLVANIA DIGITAL LIBRARY: Guidelines for Topics, Materials, Priorities, Best Practices, Next Steps.” (The Pennsylvania Digital Library, 2008.)

<http://padl.pbwiki.com/f/PA+Digital+Collection+Development+Guidelines--as+of+07-30-08.pdf>

**Project planning.** “Digital Projects Guidelines.” This is a wonderful, all-around guide. (Arizona State Library, Archives and Public Records, 2007.)

<http://azmemory.lib.az.us/cdm4/policies/DigitalProjectGuidelinesv3.5.pdf>

**Funding.** Visit the Web site of the Institute of Museum and Library Services (IMLS) for information about their grant programs.

<http://www.ims.gov/applicants/applicants.shtm>

*(Notes: All online resources are hotlinked in the Web version of this document, available at [http://www.oclc.org/info/quickstart/guiding\\_digital\\_success\\_handout.pdf](http://www.oclc.org/info/quickstart/guiding_digital_success_handout.pdf).*

## Stage 2: Develop your digitization project

Next, you need to select the materials for your digitization project based on your user community, and then evaluate the necessary and available resources.

- ❑ **Define the primary and secondary user groups.** Who are the current users and who are the potential users of the materials you would digitize?
- ❑ **Select and prioritize materials for digitization.** The selection is based on your primary user group's needs, your collection needs and program sustainability. For your first digital collection, especially if you decide to digitize in-house, it's easiest if you pick a group of materials that are all the same format (e.g., all black-and-white photographs or a group of color postcards).
- ❑ **Evaluate staff skills, training needs and resource availability.** Consider whether to digitize in-house or outsource the necessary tasks by comparing available in-house resources against vendors' options and pricing.
- ❑ **Select a digital collection management system.** Some criteria to consider include: ease of use, flexibility, whether your collections may be hosted by the system vendor, support, total cost of ownership, the cost for systems support, training, associated software fees and incremental charges in both the short- and long-term.
- ❑ **Weigh current hardware and software needs.** Base your decision on the system requirements of the digital collection management system you have selected.
- ❑ **Develop a marketing communications plan.** Consider internal communications, as well as marketing to your end users and colleagues in your community. Some ideas to consider: listservs, newsletters, press releases and print materials (e.g., brochures and posters). Be creative in spreading the word about your new digital collections!

### Stage 2 – Learn More

**Digital imaging.** This highly regarded online tutorial, "Moving Theory into Practice: Digital Imaging Tutorial," provides information on how to convert and make materials accessible. (Cornell University Library, 2003.)

<http://www.library.cornell.edu/preservation/tutorial/contents.html>

**Selection.** Information about how to select materials for a digital project is provided in "Planning Digital Projects for Historical Collections in New York State." (New York State Library's Division of Library Development.)

<http://digital.nypl.org/brochure/planning.htm#select>

**Software.** Starting on page 9, this report outlines key criteria to consider when choosing digital asset management software. (Archival Management Software, 2009.)

<http://archivalsoftware.pbworks.com/Selection-Criteria>

## Stage 3: Prepare and digitize materials

Once you have laid the foundation by working through the planning tasks, you're ready to begin digitizing your primary source materials.

- **Examine the first collection you selected to be digitized.** First, inventory the materials you selected and then organize them to prepare them for digitization.
- **Tend to any conservation and intellectual property concerns.** Key among these are copyright issues. Do you hold the copyright or are the materials in the public domain? Will you be able to secure the copyrights and all the necessary permissions? Treat your materials for preservation according to type of format and standard practices.
- **Decide on the minimum metadata elements.** Consider your items and the metadata you'll need to describe them. The metadata can be as simple or as complex as you want it to be. Some common metadata schemes are MARC, METS, EAD and Dublin Core.
- **Develop your specifications for digitization.** When developing your specifications, such as resolution, file formats and image types, you can consult with online guides or check with regional consortia in your state that may have already developed a set of best practices for digitization.
- **Begin by digitizing a sample of materials.** Alternatively, you may send the materials to a service provider that specializes in digitization.

### Stage 3 – Learn More

**Scanning.** BCR's CDP Digital Imaging Best Practices Version 2.0. (BCR's CDP Digital Imaging Best Practices Working Group, 2008.)

<http://www.bcr.org/dps/cdp/best/digital-imaging-bp.pdf>

**Scanning.** Western States Digital Imaging Best Practice. (Western States Digital Standards Group Digital Imaging Working Group, 2003.)

[http://www.bcr.org/dps/cdp/best/wsdibp\\_v1.pdf](http://www.bcr.org/dps/cdp/best/wsdibp_v1.pdf)

**Metadata.** Metadata Best Practices, Version 1.0. (University of Colorado Digital Library, 2009.)

<https://www.cu.edu/digitallibrary/cudlmetadatabp.pdf>

**Dublin Core Metadata Guide.** This guide outlines a digital library's metadata practices. (Indiana Memory Project, 2007.)

[http://www.in.gov/library/files/dig\\_metast.pdf](http://www.in.gov/library/files/dig_metast.pdf)

**Copyright law.** Copyright Policies for Collection Managers. (University of Colorado System.)

<https://www.cu.edu/digitallibrary/policies.html>

## Stage 4: Set up computer hardware and software

Your organization's computer system needs to be prepared for your new digital library. If there are information technology (IT) staff available to help, these steps will be ones they can manage.

Alternatively, you may choose to have your digital collections hosted by a third-party service. Hosting services are a good option for those organizations that prefer not to allocate the personnel or hardware needed to run a system on a local server.

- ❑ **Install the software (or set up collection parameters with hosted services provider).** Next, if you selected a digital collection management solution that offers hosting services, upload your digital collections to their server.
- ❑ **Configure your Web server and file systems (if necessary).** Begin by reviewing any documentation and support materials available from your digital collection management system before you configure your Web server and file systems.
- ❑ **Consider the end user interface.** Keep in mind your project objectives and materials. Factors to consider: files sizes and download times, required plug-ins and other applications, etc.

### Learn More

**Designing for usability.** We recommend reading the section titled, Presenting Your Materials, starting on page 17 of the "Digital Projects Guidelines." (Arizona State Library, Archives and Public Records, 2006.)

<http://www.lib.az.us/digitalProjectsGuidelines.pdf>

## Stage 5: Test and build your digital library

Now it is time to create and test your digital library prototype, then complete the building process. Once you have a sample of your digitized materials in your digital management system, you should review your processes, conduct user testing and evaluate your prototype. Finally, you will begin the full-scale production and building of your digital library.

- ❑ **If you digitized in-house, test the capture, storage and backup routines.** Take notes on your routines and create a set of best practices for those digital items.
- ❑ **Test the build process for your collection.** The physical format of your original material, whether it is a photograph, book or other type, will determine the build process you'll need to follow for your digital asset management software. Using your digital asset management software, be sure to test that process to make sure the outcome is what you're expecting.
- ❑ **Conduct usability testing.** Usability testing is an invaluable tool for developing the user interface and making sure your digital library is properly accessible. This doesn't have to become a huge undertaking. Even taking the time to have a group of eight staff members or volunteers test the interface by performing typical search-and-retrieval tasks will provide significant feedback.
- ❑ **Assess your processes, metadata and user interface as needed.** Based on the usability testing results you may need to make some changes to your system. Decide which changes to make immediately and which to make in the future. As your digital library grows, you will need to revise processes and metadata continuously to accommodate the format and other aspects of new materials.
- ❑ **Build out your digital library.** Once you have the processes and metadata worked out for your first digital collection, finish importing the collection's digital objects and corresponding metadata.

### Learn More

**Digital Collections: Usability Testing.** Learn how one digital library tested, analyzed and developed their site. (Angela Rosette-Tavares, University of Washington, 2008.)

[http://www.oclc.org/western/info/contentdmug/presentations/Rosette\\_Tavaras\\_UW\\_usability.pdf](http://www.oclc.org/western/info/contentdmug/presentations/Rosette_Tavaras_UW_usability.pdf)

## Stage 6: Launch!

Once you've completed the evaluation of your prototype and made any necessary adjustments, it's time to launch your brand new digital collection. Congratulations!

- **Choose a launch date.** Consider unveiling your digital library on a day coinciding with a special event, historical date or important anniversary for your organization.
- **Begin your publicity efforts.** Be creative and consider a range of activities and methods to getting the word out, including blogs, listservs, newsletters, handouts, posters and speaking engagements.
- **Decide what's next.** Hold a project review meeting with library staff to jointly discuss your new digital library. Establish evaluations of the collection's usefulness to your various user segments, and generate ideas for future funding of other digitization projects.

### Stage 6 – Learn More

**Promoting digital collections.** Visit the marketing section of this guide, Digital Best Practices. (Washington State Library.)

<http://digitalwa.statelib.wa.gov/newsite/projectmgmt/marketing.htm>

**Planning for sustainability.** Business Planning for Cultural Heritage Institutions: A framework and resource guide to assist cultural heritage institutions with business planning for sustainability of digital asset management programs. (Liz Bishoff, Nancy Allen, 2004.)

<http://www.clir.org/pubs/reports/pub124/pub124.pdf>

## Conclusion

A successful digitization project can bring all kinds of rewards and recognition to your library. Hopefully, the digital collection will grow over time and attract positive attention to your efforts. The inevitable question at the conclusion of such a project is often, “So what’s next?”

At the end of any digitization project, it’s a good idea to review your project planning documents, discuss (and record) what went well and what could be improved, and make sure your team all knows how important their contributions were. Everyone who was involved should be included in communications about the project’s success, as you might want their help with future efforts.

We hope that your first digitization project is such a success that you and your staff will be eager to launch another.

Please feel free to send us comments about this guide by e-mailing us at: [digitalcollections@oclc.org](mailto:digitalcollections@oclc.org). We welcome the opportunity to hear about your efforts, and would like to know how your experiences might improve this document for others.

## Appendix

The following “Learn More” links, which were accessed August 30, 2010, are referred to throughout this document:

### Stage 1 – Learn More

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**Metadata.** Metadata Best Practices, Version 1.0. (University of Colorado Digital Library, 2009.) <https://www.cu.edu/digitallibrary/cudlmetadatabp.pdf>

**Dublin Core Metadata Guide.** This guide outlines a digital library’s metadata practices. (Indiana Memory Project, 2007.) [http://www.in.gov/library/files/dig\\_metast.pdf](http://www.in.gov/library/files/dig_metast.pdf)

**Copyright law.** Copyright Policies for Collection Managers. (University of Colorado System.) <https://www.cu.edu/digitallibrary/policies.html>

### Stage 4 – Learn More

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<http://www.clir.org/pubs/reports/pub124/pub124.pdf>

## About OCLC

Founded in 1967 and headquartered in Dublin, Ohio, OCLC is a nonprofit library service and research organization that has provided computer-based cataloging, reference, resource sharing, eContent, preservation, library management and Web services to 72,000 libraries in 171 countries and territories. OCLC and its member libraries worldwide have created and maintain WorldCat, the world's richest online resource for finding library materials. For more information, visit [www.oclc.org](http://www.oclc.org).

## About OCLC Digital Collection Services

A range of options from OCLC supports the digital life cycle; from planning and managing, to preserving and sharing primary source materials. These solutions serve the needs of organizations just starting to explore digital possibilities, as well as those that are fully engaged in digital collection management. Whether you have photographs, audio/video materials, documents, newspapers, maps or any combination of materials, OCLC can provide the expertise and services you need. For more information, e-mail [digitalcollections@oclc.org](mailto:digitalcollections@oclc.org).