



Whether you're just beginning a digital library program or you've already purchased CONTENTdm, planning is a critical part of implementing your digital library. This document will guide you through key decisions and steps you'll need to make to ensure your digital library is a success.

The planning stages

Planning your digital library program. These first steps will help you lay the foundation for your program. By working through these steps, you'll build a stronger program and have a clearer vision of it.

- A. Consider your organization's strategic plan and, if appropriate, your parent institution's and consortium's.
- B. Develop your program's goals and objectives, making certain they support your organization's vision, values and mission.
- C. Define your organization's commitment to digital resource access and preservation.
- D. Identify stakeholders within your organization, as well as your parent organization and user communities.
- E. Structure cross-functional teams to articulate and interpret policies on collection development, information technology, metadata, security, preservation and access.
- F. Set up an advisory council.
- G. Budget for your program.
- H. Plan revenue generation and resource redeployment.
- I. Plan development actions (grant writing, donor solicitation campaigns, etc.)

Planning your digitization project. These next steps will help you to select the materials for your first digitization project, as well as to acquire the necessary hardware and software.

- A. Define the primary and secondary user groups of your digital materials.
- B. Decide your primary focus and select partners based on user groups' needs, project sustainability and funding opportunities.
- C. Select your materials based on the primary user groups' use of digital collections.
- D. Select software for digital collection management based on cost-effectiveness and ease of use for the primary user group and your collection management staff.

Planning your digitization project, continued

- E. Assess available hardware and software; if necessary, acquire more software and equipment.
- F. Assess staff skills, training needs and resource availability. Consider outsourcing tasks by evaluating vendor programs and prices.
- G. Create a marketing and communications plan.
- H. Prioritize materials for future digitization projects.

The preparation stages

Preparing your materials for digitization. Once you're ready to begin digitizing your primary source materials, these steps will guide you along the way.

- A. Select your first collection to be digitized from the list of ordered priorities; consider users' needs, collection needs, project feasibility and program sustenance.
- B. Locate the materials, assess their condition and inventory them.
- C. Tend to any conservation and intellectual property concerns. Treat for preservation according to format and standard practices.
- D. Research possible restrictions or copyright issues concerning the digital display of the materials.
- E. Consider the need for controlled vocabularies and create or import as necessary.
- F. Decide on the minimum metadata elements for description, administration and structure.
- G. Choose a sample of materials in diverse formats, then create the metadata for the sample at both the item and collection level.
- H. Decide structural and administrative conventions regarding compound objects, file naming and volume management scheme for staging areas and archives.
- I. Write or adopt specifications for digitization and archiving (file formats, display resolution, archiving, etc.)
- J. Digitize a sample of materials or contract with a vendor that specializes in digitization.



The preparation stages, continued

Preparing your computer system. Your organization's computer system needs to be ready for your new digital library. Outlined below are the key steps you need to complete.

- A. **Install software** for the CONTENTdm server and Acquisition Stations.
- B. **Alternatively, arrange a hosted server environment** with DiMeMa, Inc.
- C. **Configure the Web server and CONTENTdm server file systems, users and groups.**
- C. **Design the user interface** for program and project contexts; if necessary, provide advice on metadata requirements.
- D. **Reconsider metadata requirements and controlled vocabulary functionality** as necessary to enhance ease of access.

The testing stages

Testing your processes. Once you have a sample of digitized materials and your software and hardware are ready, you'll want to create and test all your processes and routines.

- A. **Create collections and configure metadata templates and controlled vocabularies.**
- B. **Test capture, storage and backup routines** for all formats.
- C. **Test the build process** for collections.
- D. **Test the import process** for ASCII, tab-delimited files to import existing or in-process collections.
- E. **Train staff** to build varied types of simple and compound objects.
- F. **Test default search and browse screens.**

Testing the prototype. Once you've built a prototype of your digital library, you'll want to do user testing. Then, based on the test results, revise your prototype as needed.

- A. **Organize typical user group tests** and report any problems to the team.
- B. **Adjust collection field configurations, metadata choices and customize help screens** as necessary.
- C. **Write Custom Queries and Results** across collections.
- D. **Test metadata and display for usability** by diverse set of users from primary and secondary user groups.
- E. **Revise collection building and public services** as needed.

Additional resources

Here are some additional resources to help you plan your digital library.

The British Columbia Digital Library; Digital Library Construction Tools: How-To Manuals
David Mattison, Victoria Telecommunity Network, BC. Copyright © 2000–2004 by the BC Community Network Association.

www.bcdlib.tc.ca/tools-manuals.html

Colorado Digital Library's *Digital Toolbox*

www.cdpheritage.org/digital/index.cfm

Creating New Digital Projects at The University of Arizona Library <http://digital.library.arizona.edu/documents/development/checklist.rtf>

Moving Theory into Practice: Digital imaging tutorial by Cornell University Library www.library.cornell.edu/preservation/tutorial/contents.html

For more information

To discuss your specific needs or for more information, please contact OCLC at

1-800-848-5878, ext. 6251 or
libservices@oclc.org

Learn more about CONTENTdm at
www.oclc.org/contentdm/