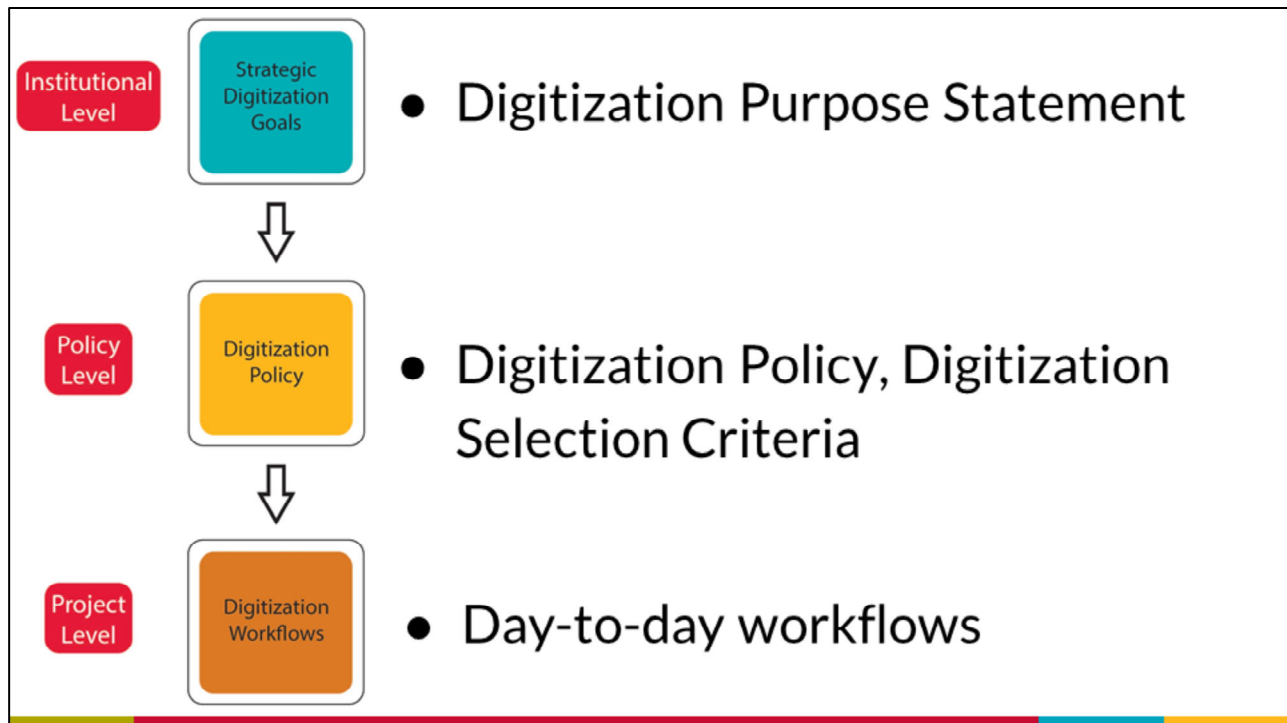# Digitization Policies
Digital Stewardship Curriculum

- Institutional level - have more than just you involved, come up with the directions you want to go in, big goals for your digital projects
  - See SHN resource: Strategic Digitization Goals Part 1: Digitization Purpose Statement Worksheet
- Policy level - something that you create to give you guidelines to work with, informed by the goals and plans, takes time to develop but will be something you can rely on going forward
  - See SHN resources:
    - Strategic Digitization Goals Part 2: Digitization Selection Criteria Worksheet
    - Strategic Digitization Goals Part 3: Digitization Policy Worksheet
- Project level - day-to-day workflows and processes make sure they fit in with what you created at the policy level
- Always remember the importance of laying down policies and guidelines before you start projects

Develop "Selection Criteria"

- Can't digitize all at once - PRIORITIZE
- Draw from:
  - "Why Digitize" list
  - "Should We Digitize and Can We Digitize" questions
- Develop criteria questions
  - For "selection," "prioritization," etc.
- Create workflow for defining process
  - "Does XYZ project fit in with our criteria?"

- Need to PRIORITIZE and SELECT
- Discuss digitization goals, needs and priorities with your team
- See SHN resources
  - "Why Digitize" Slides
  - Digitization Project Decision-making: Should We Digitize? Can We Digitize?
  - Digitization Project Decision-making: Starting a Digitization Project
- Use Why Digitize discussions, Should We/Can We questions (with your team, and larger discussions at your institution)
- Since you can digitize EVERYTHING, how will you select what to digitize first?
  - Develop your criteria
- Create a workflow...Develop questions that will help you make decisions on whether to digitize something
  - This is how you IMPLEMENT your criteria
- This slide follows the SHN resource: Strategic Digitization Goals Part 2: Digitization Selection Criteria Worksheet

Create a workflow document – Digitization Selection Criteria

- Who is responsible for making decisions?
  - One person or many people
  - What are their roles in the process
- Choose format that will be helpful:
  - Checklist/form/worksheet, decision tree, list of questions, committee meeting guidelines

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- What does this workflow look like for you?
  - Who is it for?
  - Format - checklist, form, decision tree, list of questions, meeting process
  - You can create whatever works best for you

Digitization Policy Sections

- Digitization Purpose Statement
- Selection criteria
- Digitization goals
- Methods of digitization
- Scope of digitization
- Roles and responsibilities

- This slide follows the SHN resource: Strategic Digitization Goals Part 3: Digitization Policy Worksheet
    - Purpose statement: What you have already drafted in a Digitization Purpose Statement
    - Include your selection criteria workflow or describe: How you prioritize and select
    - Goals: Why digitize? What are the reasons that you want people reading to understand
    - Methods: How do you digitize? In your department? Visiting other institutions? Using a vendor?
    - Scope: What do you digitize?
    - Roles: Who is involved in digitization?

Digitization Policy Sections

- Technology, metadata, specifications, standards
- *Access and use (link other policy)*
- *Procedures*
- *Define key terms*
- Contact information
- Revision statement and date

- After those important sections - we get to more practical matters. Some of these you may separate into a separate manual or procedures guide.
- What technology is used? What file specifications and why? What metadata is gathered? What standards do you follow? Copy of standards
- How do you provide access to digitized collections? How do people use them. Can simply reference your ACCESS AND USE policy which might be separate. OR can have specific information for digital materials. Make sure digital is covered in BOTH policies, and at least one in specfics.
    - What access platforms do you use? Permissions and levels of access?
- Procedures - steps for digitization, saving, file naming, preservation, scanning, creating access copies (many steps - make sure they are documented) - may be external document
- Define key terms found in your policy - what do you want to include so people will understand what you are talking about?
- Contact info
- Revision statement and date

First Steps: Forming a Digitization Policy

- **Start with Digitization Purpose Statement**
- **And "Why Digitize" Activity**
  - Discuss for your institution specifically
- **Scope of policy**
  - What formats, what types of projects, how digitization happens

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- First steps to think about when beginning to create your policy:
  - Read your Digitization Purpose Statement to refresh your memory - this is the foundation of policy
  - Write your own "why digitize" reasoning for your community
  - What will your main priorities be for digitization -- will you digitize all the tribes office files, or are you focused on photographs and maps?

Find Examples

- Look at other digitization policies
- Ideas, inspiration, differences
- How to find policies:
  - Search online "digitization policy + [library, museum, archive, Indigenous, Tribe, etc.]"
  - Ask colleagues who do similar work
  - Reach out to professional organizations

- Examples are very helpful

Discuss or Reflect

Find examples of other digitization policies.

- Find a few digitization policies from similar institutions to yours
  - Identify a strength of the policy
  - Identify parts or sections you want to expand on
  - Identify missing components
- Discuss or reflect
  - This activity can be done alone if necessary, but we find this specific idea generation works best through conversation and sharing.
  - Gather some other people who have insight into your community needs and priorities.

Digitization Policy: Next Steps

- Digitization Policy Worksheet
- Answer the questions with your partner
- **Start draft of your digitization policy**
- Focus on:
  - #2 - Selection Criteria
  - #3 - Why Digitize?
  - #4 - Methods (how do you digitize?)
  - #5 - Scope (what do you digitize?)

- After you have discussed Digitization Policy examples examples, discussed your own goals, and made a Digitization Purpose Statement, it is time for drafting a policy of your own
- Whether you are creating a digitization policy for the first time, or looking at your current digitization policy and seeing if there is anything to revise or add to…
- We highly recommend the SHN resource: Strategic Digitization Goals Part 3: Digitization Policy Worksheet
- There are many steps to this document- for the first few times you work on this, focus on these first steps
  - #2 - what will this tool look like, what questions/topics do you want to check each time
  - #3 - Reasons for digitization
  - #4 - How do you digitize currently? What is your capacity for digitization
  - #5 - What materials are you able to digitize, or are you interested in digitizing (explaining your selection criteria in broad terms) -- or merge the two sections
  - When ready, move onto additional steps in the worksheet

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