PLANNING TEMPLATE

Note: for this exercise fundraising is not included however it would be a major component of any project development

Big Picture

1. Identification
Identify collection material in your collection or a sister organization which has regional or national research value and if digitized would provided new methods of access to the materials and could bring your institution needed recognition or further financial support.

2. Solutions
What problems would you like the project to solve? Describe the goals for the project.

Vendor Requirements

3. Outcomes / Deliverables
Imagine the outcomes or deliverables for the final product.

4. Parameters for Vendors
- What services does the vendor need to provide you?

- Imagine what types of tests results you may want to have before giving a green light to the Vendor.

- How would you like the materials transported and if necessary in what increments?

Project Launch

5. Marketing
How will you market and introduce your project / final product.

6. Evaluation
What would you like to measure at the beta stage or after the project is launched?

Staff Considerations

7. Staff

- Who in your organization or sister organization needs to be involved?

- How much time per week can your staff realistically put towards supporting the on-going project.

- What are the possible impacts on your staff? Are there ways to mitigate these impacts?