



Digitization Policy Framework

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Introduction

Use this framework, developed by the Canadian Heritage Information Network, to guide you through the development of a digitization policy for your heritage institution.

In your policy, define which objects to digitize, under what conditions, and why. Address the intended use of digitized content, including access, copyright and reuse. Ensure the policy provides a foundation for a digitization plan, which is a technical document that outlines how, when and with what resources digitization will occur.

Once the policy and plan are in place, develop digitization procedures to support day-to-day operations and ensure consistency across all digitization activities.

Policy components

The following is a summary of the components that should be found in any digitization policy document.

Cover page

Include the following information on the cover page:

- The document's title
- The date the policy comes into effect
- The current version
- Any superseded versions (struck out)
- Signatures of those who have signing authority to put the policy into action, and signature dates

Policy development team

List who is involved in the development of the digitization policy. Clearly indicate a lead, who is responsible for ensuring the policy is completed and for organizing and chairing meetings that push development of the policy forward. This lead could be anyone deemed sufficiently competent to push projects forward under their own direction. Also include a champion. This is typically someone who manages the resources (labour and funding) necessary to carry out a digitization plan. Finally, include decision-makers (typically managers) who will be affected by the resulting digitization plan, either because members of their teams will:

- be responsible for implementing the plan (for example, digitization experts or photodocumentation specialists)
- directly contribute to the plan (for example, by providing access to the collections and documentation)
- use the resulting digitized content (for example, to publish it)



- affect or be affected by the plan in any other way (for example, an IT team, who may have their own digitization strategy)

To avoid overburdening the team, the lead should determine when various members should participate in policy development; not everyone needs to be at each meeting.

Background and justification for digitization work

Outline issues that led up to a need for digitization. Include a broad description of holdings or objects that are to be digitized and any issues of note that will need to be addressed by a digitization plan.

Also provide justification for digitization work (and consequently a justification for the time and resources necessary to digitize). You may call into play the institution's mandate, goals or objectives that support the need to digitize. You may also reference a recent business plan, strategic document or similar resource that provides cause for digitizing.

Compliance statement

Outline what standards and best practices will be adhered to. Compliance with these standards and best practices ensures that the time and energy you invest in the work will yield a quality result.

From the following three categories, list the standards, best practices and guidelines with which your institution will comply:

- Image capture standards, best practices or guidelines (for example, [Guidelines: Technical Guidelines for Digitizing Cultural Heritage Materials](#), [Digitization Standards for the Canadian Museum of Civilization Corporation](#) (PDF format) and [Capture Your Collections: A Guide for Managers Who Are Planning and Implementing Digitization Projects](#))
- Documentation standards and best practices (for example, use of collections management data, PREMIS metadata and EXIF [Exchangeable Image File Format] metadata, and preservation of operating system-level metadata)
- Digital preservation standards and best practices (refer to a digital preservation policy and plan, if these exist.)

Policy description

Use this section to explain the policy in general. It should provide an overview of the policy and can include anything not specifically addressed in the subsections that follow. Here are some examples of information to include:

- Why and how the content will be used
- Any standard of service regarding how quickly content should be digitized
- Any other aspect of the policy specific to the institution's needs



Scope

Indicate what sorts of objects will be digitized (for example, “all photographic prints in our collection”) and provide any criteria for the process behind this decision (for example, “we intend to publish online all still-image digital assets”). Identify what, if anything, will **not** be digitized (that is, what is out of scope), and again, indicate why.

If your institution has related policies or plans (such as a digital strategy or a digital preservation policy), include them here. This helps readers know where to find more information and clarifies that, although these activities are related, they fall outside the scope of this document.

Selection

Indicate how objects for digitization will be selected and prioritized. If an external guideline or best practice is being used as selection criteria, indicate this.

Copyright

State what copyright permissions are to be obtained and describe what copyright management activities are necessary to ensure copyright compliance.

Publication and access

Indicate what digitized content is to be published or made accessible and, in broad strokes, how. Refer to any relevant publication plans or mechanisms, including publications software, websites and databases.

Description of the digitization plan

Once a plan has been chosen, complete this second half of the policy. This information is included in the policy only because the policy document is a high-level document that enables executives to get a general understanding of the entire course of action in a single document. It also ties the plan back to the policy by clearly illustrating how the plan followed policy guidelines.

Briefly describe the chosen plan, indicating what work will be digitized internally, what will be digitized externally, and when. Include the following details.

Technology

Describe what technology (hardware and software) will be used in the digitization workflow. Indicate how it is appropriate for the content being digitized.

Human resources and accountability

Indicate who (which roles or titles) will be responsible for digitization and what training they need and have (or will receive) to carry out this work.

Timelines



Indicate what digitization work is to be a term-based and what is considered a core activity. Provide timelines for the implementation of work and for any standard (for example, “we will digitize new objects within one year of their accession”).

Access and publication

Indicate how content will be made accessible, according to the needs of the institution. Indicate whether some or all of the content will be published online, and if so, how (for example, using what publication mechanism, software or partners).

Digital preservation

Indicate how the digitized content will be preserved for long-term access. Refer to any digital preservation policy or plan that has been implemented to ensure this.

Challenges and risks

Indicate any known challenges or risks with the chosen plan and how they will be mitigated.

Financing

Indicate the amount of funding required and from where it will come, for term-based work and for any core activity.

Triggers for revision

Identify when the policy (and possibly the plan) should be reviewed and revised. This section typically includes a mandatory review every two to three years, as well as recognition that a change in resources, the institution’s mandate, available technologies or similar issues (list all that may be relevant) may also necessitate review of this document.

Definitions

As the digitization policy is a high-level document, it should be accessible to any reader without technical knowledge. Include a description of any abbreviations or technical terms used.

References

Include in the policy references to any internal, external or web-based resources to which the policy refers.

Bibliography

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