Migration Planning Worksheet

Institutional Characteristics

1. **What best characterizes your institution type?**
   Check all that apply.

   ☐ Independent research library/archives

   ☐ Private college/university library

   ☐ Public college/university library

   ☐ Public library

   ☐ Government library/archives

   ☐ Regional consortium

   ☐ Historical society

   ☐ Museum

   ☐ Other: _____

2. **Annual Budget**

   _____

3. **Number of employees supporting digital collection management (FTE)**

   _____

4. **Departments of employees supporting digital collection management**

   _____

   _____

   _____

   _____

   _____

5. **Approximately what number of FTE of local IT employees' time is devoted to digital collection management per year?**
   For example, 0 FTE, .5 FTE

   _____

Digital Collection Management

6. **Who are the primary stakeholders for your digital collections?**
   This may include particular departments in your organization, organization administration, community organizations, etc.

   _____

   _____

   _____

   _____

   _____

7. **Describe the administration surrounding your digital collections**
   What structures, committees, etc. are in place related to the administration of digital collections? This may include individuals or groups that create policy, have technical administrative control over the repository, etc.

   _____

   _____

   _____

   _____

   _____

8. **Describe your digital collection system dependencies**
   Describe the systems involved and how they interact. For example, the ILS pulls digital collection data from an API, etc.

   _____

   _____

   _____

   _____

   _____

Digital Collection Analysis

9. **What system(s) are used to manage the digital collections to be migrated?**
   Check all that apply.

   ☐ CONTENTdm

   ☐ DSpace

   ☐ Islandora

   ☐ Sufia

   ☐ Avalon

   ☐ ILS

   ☐ Locally developed solution

   ☐ Other: _____

10. **Number of digital collections to be migrated**

    _____

11. **Number of digital objects to be migrated**

_____

12. **Total size (TB) of digital objects to be migrated**

_____

13. **Describe the data model(s) supported by your your current repository**
Consider describing the most complex object you have in your repository. How many levels of hierarchy does it have? Is metadata stored for each level?

_____

_____

_____

_____

_____

Content Analysis

14. **Work types**
Describe the types of digital objects to be migrated
Check all that apply.

☐ Single sided photograph

☐ Single sided document

☐ Multi-page document

☐ Single audio

☐ Multi-part audio

☐ Single video

☐ Multi-part video file

☐ Hierarchical work

☐ Multiple file types (e.g. audio/video file with image or PDF)

☐ Datasets

☐ Other: _____

15. **Access file types**
What file types will be produced or migrated for access purposes?
Check all that apply.

☐ jpeg

☐ tif

☐ mp4

☐ wav

☐ pdf

☐ csv

☐ Other: _____

16. **Do you require copies or production of other file types for access or preservation?**
    Mark only one oval.

    ◯ Yes

    ◯ No

    ◯ Maybe

    ◯ Other: _____

17. **Where are the files located for the digital collections to be migrated?**

    _____

    _____

    _____

    _____

    _____

Metadata Analysis

18. **Which metadata schema(s) are used in your digital collections?**
    Check all that apply.

    ☐ Dublin Core

    ☐ MODS

    ☐ MARC

    ☐ EAD

    ☐ PB Core

    ☐ VRA Core

    ☐ Local metadata schema

    ☐ Other: _____

19. **What field(s) are required?**

    _____

    _____

    _____

    _____

    _____

20. **Are the same metadata elements used across your digital collections?**

If no, describe how metadata elements differ across collections.

_____

_____

_____

_____

_____

21. **What data types populate the fields?**

Check all that apply.

☐ Strings

☐ Numbers

☐ URIs

☐ Other: _____

22. **Which controlled vocabularies are used in your digital collections?**

Check all that apply.

☐ Library of Congress Name Authority File (LCNAF)

☐ Library of Congress Subject Headings (LCSH)

☐ Thesaurus for Graphc Materials (TGM)

☐ MARC Relators

☐ DCMI Type Vocabulary

☐ Art and Architecture Thesaurus (AAT)

☐ Thesaurus of Geographic Names (TGN)

☐ Union List of Artist Names (ULAN)

☐ GeoNames

☐ Medical Subject Headings (MeSH)

☐ MARC List of Languages

☐ ISO 639 Language codes

☐ Local controlled vocabulary

☐ Other: _____

23. **Do you have local metadata input guidelines and/or a Metadata Application Profile?**

Is it up to date? Are there changes you would like to make to it?

_____

_____

_____

_____

24. **Have metadata values been entered consistently across your digital collections?**
    If no, describe how values differ across collections.

_____

_____

_____

_____

_____

25. **Does your metadata, elements and/or values, align with any other standards or best practices?**
    For example, does it align with the DPLA metadata application profile? DACS?

_____

_____

_____

_____

_____

26. **How do you indicate copyright in your digital collections?**
    Describe the metadata field(s) used, controlled vocabulary used (if applicable), and any other practices around rights metadata.

_____

_____

_____

_____

_____

Migration
If you already have your new, target system selected, fill in the sections below. If not, these questions can serve as a guide to roadmapping once a new system has been selected.

27. **What system(s) will you be migrating your digital collections to?**

_____

_____

_____

_____

28. **Describe the data model(s) supported by the target repository**

Include description or link to repository data model documentation. Consider describing the most complex object supported by the repository. How many levels of hierarchy does it have? Is metadata stored for each level?

_____

_____

_____

_____

_____

29. **Which metadata schema(s) will be uses in the target repository?**

Check all that apply.

☐ Dublin Core

☐ MODS

☐ MARC

☐ EAD

☐ PB Core

☐ VRA Core

☐ Local metadata schema

☐ Other: _____

30. **Which controlled vocabularies will be used in the target repository?**

Check all that apply.

☐ Library of Congress Name Authority File (LCNAF)

☐ Library of Congress Subject Headings (LCSH)

☐ Thesaurus for Graphc Materians (TGN)

☐ MARC Relators

☐ DCMI Type Vocabulary

☐ Art and Architecture Thesaurus (AAT)

☐ Thesaurus of Geographic Names (TGN)

☐ Union List of Artist Names (ULAN)

☐ GeoNames

☐ Medical Subject Headings (MeSH)

☐ MARC List of Languages

☐ ISO 639 Language codes

☐ Local controlled vocabulary

☐ Other: _____

31. **Describe the digital collections rework you plan to undertake before, during, or after the migration process**

For example, metadata rework, file management rework, etc.

_____

_____

_____

_____

_____

32. **Number of employees supporting migration (FTE)**

_____

33. **Departments of employees supporting migration**

_____

_____

_____

_____

_____

34. **Describe the timeline established for completing the migration**

_____

_____

_____

_____

_____