

Philadelphia Area Consortium of Special Collections Libraries (PACSCL)
Digital Project Sustainability Framework
revised 2023

This document is intended to be a guide to help institutions create their own project-based preservation plans. It can apply to all the working parts of the project (scripts, code, transcripts, assets, software, etc.) and not just content asset files. Acknowledging the wide range of capacity and priorities amongst institutions, this guide does not mandate or recommend specific actions. Use the topics and questions below as jumping-off points to guide your planning and document your decisions.

PACSCL members, whether working on institutional projects or PACSCL-sponsored projects, are welcome to reference this [library of sample preservation plans \(public\)](#).

PACSCL-sponsored projects are required to complete the

 **Public Access_Digital Project Sustainability Tracking** form at the time a project is proposed (grant submitted to a funder), and update the Tracking form when the project starts, and again when it ends. Sponsored projects are also required to submit copies of all preservation plans and documentation to the [PACSCL archive of preservation plans \(private\)](#). When a PACSCL project reaches its conclusion, the  **PACSCL sunseting checklist 2023** should be followed.

Documentation

Below are types of documentation you should consider creating and/or co-locating. These concerns may be addressed in different documents or by different stakeholders (for example, storage may be included in documentation from both the IT department and the library). These items may be covered by existing documentation at project institutions and do not need to be created from scratch for the purposes of the project.

- Workflows for all processes (digitization, editing, ingest, site maintenance, etc.)
- Storage (see below for more details on things to consider with storage)
- Metadata choices/decisions
- Identifying partners and roles (this includes any MOUs)
- Who owns the documentation related to the project, who updates it, and where is it stored?

Project content and assets - what needs to be preserved?

- Define your assets
 - What file formats are you using?
 - Structure: do you consider a book with multiple page images one asset? Do you consider one oral history asset to contain an audio file, a transcript, and a photograph?

- Does each asset have a preservation master and access copy? Are you interested in preserving both?
- Are you interested in preserving files other than the content the project is delivering? (Scripts, plug-ins, branding and logos, code, software, etc.)
- What styling/branding assets are being used (logos, colors, fonts)?
- Where are scripts and code being stored and who maintains them?
- Do you have analytical, educational, or interpretive content?
- Do you outreach products or output?

Metadata

- What standards are you using?
- Is there documentation of non-standard choices (a metadata application profile)?
- Are you using bespoke or non-standard thesauri and controlled vocabularies?
- What kind of metadata are you storing (descriptive, administrative, technical/structural, preservation) and are you interested in preserving all or only some of it?
- What format is your metadata stored and/or retrieved in (json, xml, etc)?
- How can you access, retrieve, and export your metadata? Consider OAI-PMH and APIs as well as manual downloads or exports.
- Is any of your metadata included in what you consider a digital object? Do you want to preserve it along with digital assets? (i.e., in a bag or other packaged format)
- Metadata workflows: who creates it, who can access, does it change format at any point, etc.

Storage

- What services/hosts/providers are you using for storage?
 - Length of contract/renewal cycle
 - If using in-house storage, who manages it?
- How many copies of assets do you keep and where are they stored?
- Who has access to storage and how?
- Who is doing any required tech migration, monitoring, and upgrades?
- What workflows around storage already exist?
- Where is funding for storage coming from?

Data management

- Do you have a fixity monitoring process or plan?
- Do you have a format migration monitoring plan?

Administration

- What institutional policies might apply to your content? (Institutional usage policies, takedown procedures, accessibility policies, etc.)
- What policies and standards were created by this project for its own content?
- What documentation and policies govern who has editing/management access for project assets?

Access

- How do you retrieve information or data from this project?
- Who has access to edit/update various aspects of the project (assets, software, storage, metadata, etc.)?

Sunsetting

- Do you have a timeframe for how long you would like to ensure maximum original functionality of the project?
- How do you get your data out of a system?
- If a project is no longer live online, will the content still be stored somewhere and accessible to users?
- How much notice will you give users before the project is inaccessible?

Further Reading

- Annelie Rugg, "Scholarly Web Design Best Practices for Sustainability," HUMTECH, UCLA, accessed March 12, 2024, <https://humtech.ucla.edu/bestpractice/web-sustainability-best-practices/>. Focus on risk tolerance and managing risk.
- The Principles for Digital Design Working Group, "Principles for Digital Design," accessed March 12, 2024, <https://digitalprinciples.org/>.
- "Sustainability of Digital Formats: Planning for Library of Congress Collections," accessed May 20, 2024, <https://www.loc.gov/preservation/digital/formats/>
- Digital Projects Toolkit, Davidson College Libraries, accessed May 20, 2024, <https://davidson.libguides.com/digitalprojectstoolkit>
- Plan a Digital Scholarship Project, Tulane University Libraries, accessed May 20, 2024, https://libguides.tulane.edu/planning_DS
- DLF Project Managers Toolkit, accessed May 20, 2024, https://wiki.diglib.org/DLF_Project_Managers_Toolkit
- Community-Owned Digital Preservation Tool Registry (COPTR) https://coptr.digipres.org/index.php/Main_Page
- Digital Preservation Coalition <https://www.dpconline.org/>
Digital Preservation Coalition Handbook <https://www.dpconline.org/handbook>

- Digital Preservation Outreach & Education Network (DPOE-N)
<https://www.dpoe.network/>
- Scott Prater (2018): How to Talk to IT about Digital Preservation, Journal of Archival Organization, DOI: [10.1080/15332748.2018.1528827](https://doi.org/10.1080/15332748.2018.1528827)