



# Case Study Framework

DRAFT – December 2012

## I. Institution Bio & Back Story

### A. Metrics – Institutional Level

1. Number of Students and Faculty
2. Endowment and Budget
3. Carnegie Classification
4. Colleges/Academic Programs Offered

### B. Metrics – Library Level

1. Size of library
  - i. Number of Faculty and Staff
  - ii. Operating Budget
  - iii. Number of Volumes (?)
  - iv. Size of Digital Collections
2. Number of staff currently devoted to digital preservation
  - i. Organizational role
  - ii. Responsibilities beyond digital preservation
3. Library's budget for digital preservation activities
4. Digital content management and preservation software, platforms, technologies, etc. that are currently in use

### C. Defining Moment

1. What happened that made you realize that DP was an urgent, unwieldy, and unaddressed problem at your institution

## II. Self Assessment Results

- A. See Liz's self-assessment tool that was sent via email

## III. Policy Gap Analysis

- A. "As Is" Model – where you are
- B. "To Be" Model – where you want to be (different for each institution – in the spirit of established best practices)
- C. Gap – what *specifically* is keeping your institution from achieving the "To Be" (money, staffing, technical infrastructure, buy-in, etc.)
- D. Digital Preservation Policy/Program Proposal
  1. Mission/Scope

2. Etc. – Each institution can choose their own framework on which to base their proposed policy. A possible framework can be found here: [http://www.jisc.ac.uk/media/documents/programmes/preservation/jiscpolicy\\_p1finalreport.pdf](http://www.jisc.ac.uk/media/documents/programmes/preservation/jiscpolicy_p1finalreport.pdf)
  3. Digital Preservation Workflow – Specific to your institution and the types of digital objects you anticipate will be “in play”
    - i. Selection
    - ii. Acquisition
    - iii. Curation
    - iv. Archiving
    - v. Storage
    - vi. Retrieval
- E. Strategy – How will you direct people and organizations towards embracing and implementing the Policy
1. Communication & Education
    - i. Administrators
    - ii. Colleagues who are stakeholders
    - iii. Content providers
    - iv. General marketing/PR
  2. Allocation of Resources
    - i. People
    - ii. Budget
  3. What Else?

## **IV. Lessons Learned**