**Digital Collections Stewardship Workbook 2: Preparing**

**1. Group Brainstorm: Digital Stewardship Goals**

If possible, we recommend taking time to brainstorm answers to the question below with colleagues (this also works as an individual exercise).

**First**, write as many ideas as you can for each question on a large surface like a whiteboard or large sheet of paper.

**Next**, narrow down your responses for each question to the few ideas that seem most important. Write those down on this sheet. You’ll use these answers when creating your Digital Stewardship Purpose Statement later in this course.

1. Why do you want to create and share digital collections with your community?

1. What opportunities do you have? How might these opportunities serve and support your community?

1. What are some challenges you might face? Who might you talk to or collaborate with to come up with ways to respond to these challenges?

**2. Activity: Digital Stewardship Purpose Statement**

Use this space to begin drafting your purpose statement. You can refine this as you go.

1. Write down some key statements from your organization’s mission, goals, values, and objectives.

1. Write down what is known about your community’s needs and values that are relevant to your digital collections work. *Refer to the “Focusing on your community” activity from the Course 1 workbook.*
2. Take the most important goals and objectives for your digital collections that you recorded in the **1. Group Brainstorm: Digital Stewardship Goals** activity, and refine and combine these so you end up with one or two statements that best align with your organizational goals and community needs. Be specific about who will benefit.

1. Start drafting a short (2-4 sentence) purpose statement that connects your larger institutional goals (#1) and community needs (#2) to your digital collections goals (#3), to describe what you want to do and why you want to do it. *See the examples in the Digital Stewardship Purpose Statement section of the course*.

**3. Activity: Digital Stewardship Policies**

Review your institution’s existing policies for any information specific to digital collections, including digitization, preservation, and access and use. Take note of whether these topics are addressed, and if so, the names of the policies where they appear, and whether they need revising to provide guidance for your digital collections. If you’re not sure yet, that’s ok! We’ll return to these policies in later courses.

Note the policy topics your institution has already documented below, and whether that documentation appears to be sufficient for digital collections:

* Digital Collection Development (e.g., criteria for inclusion of materials; guidelines for reappraisal and deaccessioning)
* Digitization (e.g., guidelines for identifying and prioritizing what to digitize)
* Digital Preservation (e.g., guidelines for securely storing digital collections)
* Donations (e.g., review procedures, criteria for acceptance, disposition of physical objects)
* Access and Use (e.g., metadata procedures, intellectual property, copyright and permissions, conditions of use, such as non-commercial or restricted)
* Any additional policies you think may be relevant:

What’s missing in your existing policies? What new policies may you want to create? Who decides if new policies are needed? Who would be involved in drafting them? What is the approval process? Below, write down your initial thoughts about the need for future policy work.  
*(We’ll explore specific policies in more detail in later courses, so you don’t need to create any new policies at this time.)*

**4. Activity: Guiding Questions to Set up your Project**

Use the guiding questions below to begin planning your first digital collections project. You can also refer to the examples and tips shared in **Guiding Questions** in **Section 4** of the course. You may not have all the information you need at this point. You can continue to refine and add information here as you work through the courses and plan your project.

1. **WHAT** project will you begin with? *(Consider starting small.)*
2. **WHO** will be involved? *(Including employees, volunteers, internal stakeholders, external partners and community members.)*
3. **HOW** will you complete the work? What tools, resources, or potential funding will you need? *(We recommend starting with what you have, where relevant.)*
4. **WHEN** will you do this work? What’s the timeline? *(Give yourself more time than you think you’ll need and embrace flexible timelines for your first project.)*