

# Making a Case for Digital Preservation



Digital Preservation Coalition

## In This Session



- Why do we do digital preservation?
- Building a business case
- Some tools to help with:
  - Risks
  - Benefits
  - Costs
  - Business case best practice



Illustration: Digital Preservation Business Case Toolkit <http://wiki.dpconline.org/>

Part One:  
Why Do Digital Preservation?

## Why Preserve?



“The answer will **not to be found in the bits and bytes** that you look after: it will be found at the place where those bits and bytes impact on the **health and purpose of the organisation** and its capacity to deliver meaningful services in the real world.

*William Kilbride, 2015*

## We Do Preservation Because We Want:



### **1. Transparency**

Data Protection, Freedom of Information...

### **2. Safety**

Detection, disaster, recovery, audit...

### **3. Knowledge**

Scientific value, access to heritage...

### **4. Wealth**

Efficient business, management of IP...

### **5. Health**

Research, safe innovation ...

### **6. Environmental improvement**

Evidence-based policy development...

### **1. Legal compliance**

Sarbanes-Oxley, Data Protection...

### **2. Regulatory compliance**

Power generation, aviation...

### **3. Legal protection**

Patents, mis-selling, detection...

### **4. Unanticipated exploitation**

Petro-chemical, pharmaceuticals....

### **5. Business continuity**

Product recall, disaster recovery...

### **6. Business value**

The right information to the right people at the right time in a format they can use...

Digital preservation is not just about 'the bits':  
Digital preservation is not just about 'access':  
Digital preservation is not just about '.....':



**it's about**  
**people and**  
**opportunity**



Make  
the case  
here!

## Part Two: Developing a Business Case?

Is Digital Preservation Expensive?

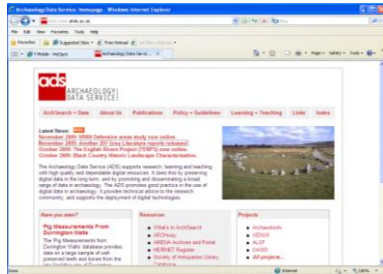


**No!**

- But it is an unfunded mandate
- Don't throw money at it
- Get the mandate properly incorporated



# A Comparison.....



Setup:  
Tens of thousands?



Setup:  
Tens of millions?

## Business Cases



Key step in gaining (financial) support and resources for programme/project

Generally include sections on:

- Objectives
- Stakeholders
- Financial Analysis
- Benefits
- Risks

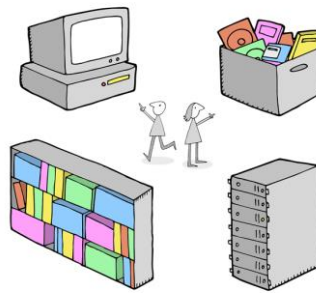


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Financial Analysis – Funding, Costs, Return on Investment

## Developing a Business Case (1)



1. Preparation
2. Audit your organisation's readiness
3. Assess where you are and what you need
4. Think hard about your audience
5. Work out your objectives



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### 1) Preparation

Is the timing right?

Do the research:

Understand organisational issues: missions and strategy as well as requirements for business cases

### 2) Audit your organisation's readiness

Conduct a [risk assessment](#) at the organisational level.

Assess your [Institutional readiness](#) – maturity modelling

### 3) Assess where you are and what you need

Depending on the scope and granularity of your activity you may want to:

Audit your digital collections.

Assess your organisation for digital preservation risks in more detail.

Decide on the main focus of your business case

### 4) Think hard about your audience

Who are your key [stakeholders](#)?

Your business case must be carefully targeted at your intended audience.

Think about what language to use

### 5) Work out your objectives for your digital preservation activity

Describe what you want to achieve with the business case and what kind of activity

you need to reach that goal.

Define your [scope](#).

Provide a brief plan of what will happen and when.

Identify [costs](#) and describe the resources needed (eg. for staff/infrastructure).

## Developing a Business Case (2)



6. Identify Benefits
7. Prepare content for the business case template
8. Validate and refine
9. Deliver your business with maximum impact
10. Share!



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### 6) Benefits

Get a generic list of digital preservation benefits as well as making a list of benefits for your digital content/collection.

Map those benefits to your organisation's strategy (prioritise benefits/work out what will appeal to your sponsor).

### 7) What else is required in your organisation's business case template?

Benefits, risks and costs are core - what else do you need to cover in your organisation's business case template?

- Cost benefit analysis or options appraisal.

- Further detail about what you want to do (implementation plan / project plan).

- Return on investment

- Where funding will come from

### 8) Validate and refine your business case

Think about what else you need to do to ensure that your business case is complete.

Review your business case carefully, and seek advice and comment from others.

Identify weaknesses in your business case.

Compare and contrast your case with others in order to identify missing detail or areas for improvement (see [Case Studies](#)).

### **9) Deliver your business case with maximum impact**

Find out how your business case will be evaluated and consider ways to increase it's chances of success.

Who is your main sponsor/advocate?

Create an Elevator Pitch, so you have the right language ready to make your case to potential advocates in your organisation.

Persistence may well be required.

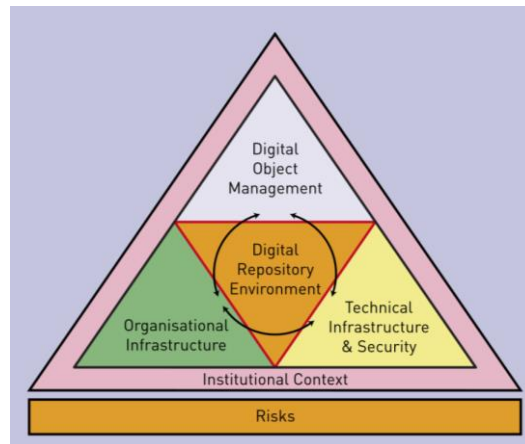
You may need to re-submit your case at a later date and/or adapt it to the feedback you get on delivering it first time around.

### **10) Share**

Consider removing sensitive details from your business case, and then sharing it [here](#) for others to learn from.

## Part Three: Some Tools to Help....

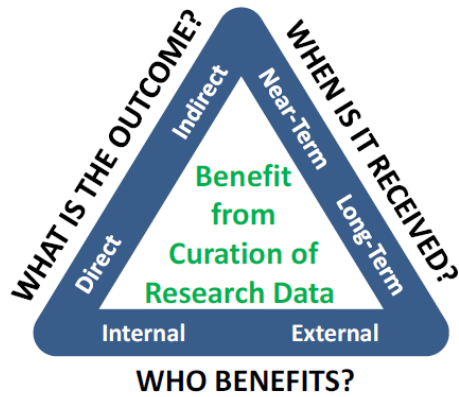
## Risks: DRAMBORA



<http://www.repositoryaudit.eu/>



## Identifying Benefits: KRDS



<http://www.beagrie.com/krds/>

# Curation Costs Exchange



## Curation Costs Exchange

Understanding and comparing digital curation costs to support smarter investments

[Home](#)

[About](#)

[Understand costs](#)

[Compare costs](#)

[Read more](#)

[Vendor services](#)

[Help](#)

[Sign Up](#)

[Sign In](#)

### All about the costs of curation

What am I spending, what are they spending, what should we be spending?

#### Understand costs

Assessing your costs and using cost models to make smart investments



#### Compare costs

Add your curation costs and see how they compare with others

<http://www.curationexchange.org/>

# The Cost of Doing Nothing....



The Cost of Inaction Calculator

The Acme Story

Analyze Your Collection

Log In / Sign Up

## COST OF INACTION CALCULATOR



You've invested time and money to preserve the physical objects in your media collection.



However, over time audiovisual materials will become unusable due to decay and obsolescence.



The only way to save your collection is to reformat through digitization.



The cost of digitization may be great, but the cost of inaction may be even greater.

Use our calculator to analyze your Cost of Inaction

**ANALYZE YOUR COLLECTION »**



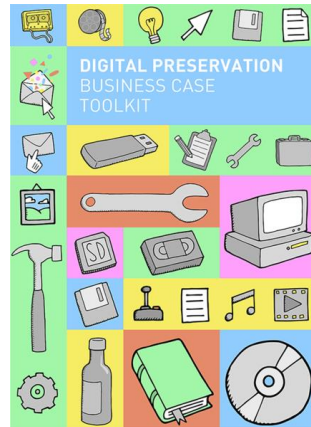
Or watch this video to find out more

<http://www.repositoryaudit.eu/>

# Business Case Toolkit



- Step by Step Guide
- Business Case Template
- Common Questions
- Case Studies
- Additional Resources.....



[http://wiki.dpconline.org/index.php?title=Digital\\_Preservation\\_Business\\_Case\\_Toolkit](http://wiki.dpconline.org/index.php?title=Digital_Preservation_Business_Case_Toolkit)

Case studies incl. example elevator pitches

## Exercise: 2 Min. Elevator Pitch



Some questions to consider:

- To whom you are pitching?
- What is the value of the collection?
- What problems do you face with the collection?
- What work needs to happen?
- How long it will take?
- What benefits will flow from the work?
- How does it relate to strategic objectives?
- What will success look like?

2 minutes (approx. 200 words)