

Preservation Planning...

...from theory, to practice



Image by Louis Prado, Noun Project



Digital **Preservation** Coalition



Terminology: what is Preservation Planning?

- A practical process supported by the Plato software tool, for making preservation decisions?
- A definition from the OAIS reference model, for planning activities within a digital repository?
- Strategic organisation planning for preservation?
- And more....

Strategic preservation planning at your organisation

- Organisational audit: maturity modelling

- [NDSA Levels of Preservation](#)

- Organisational Preservation Policy

- What, why, when, where, who

- Ensures consistent and coordinated approach

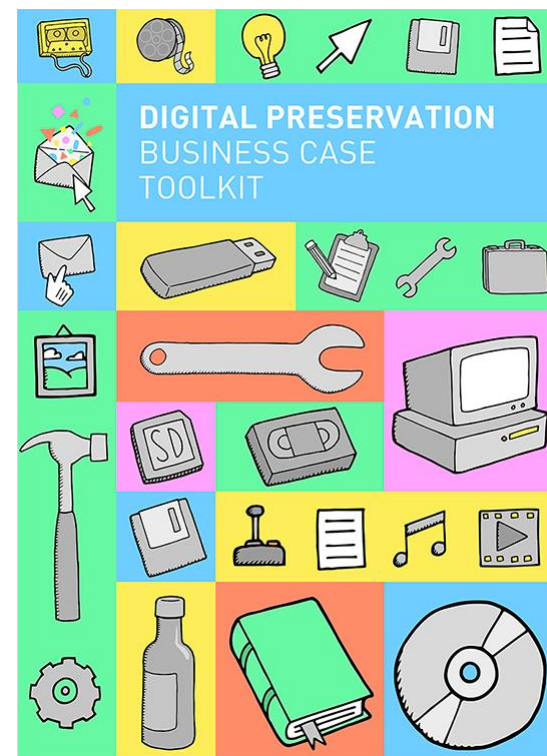
- Get organisational buy in

- [SCAPE's Catalogue of policy elements](#)

- Make the case for digital preservation

- Funding! Staff, equipment, training

- [Digital Preservation Business Case Toolkit](#)

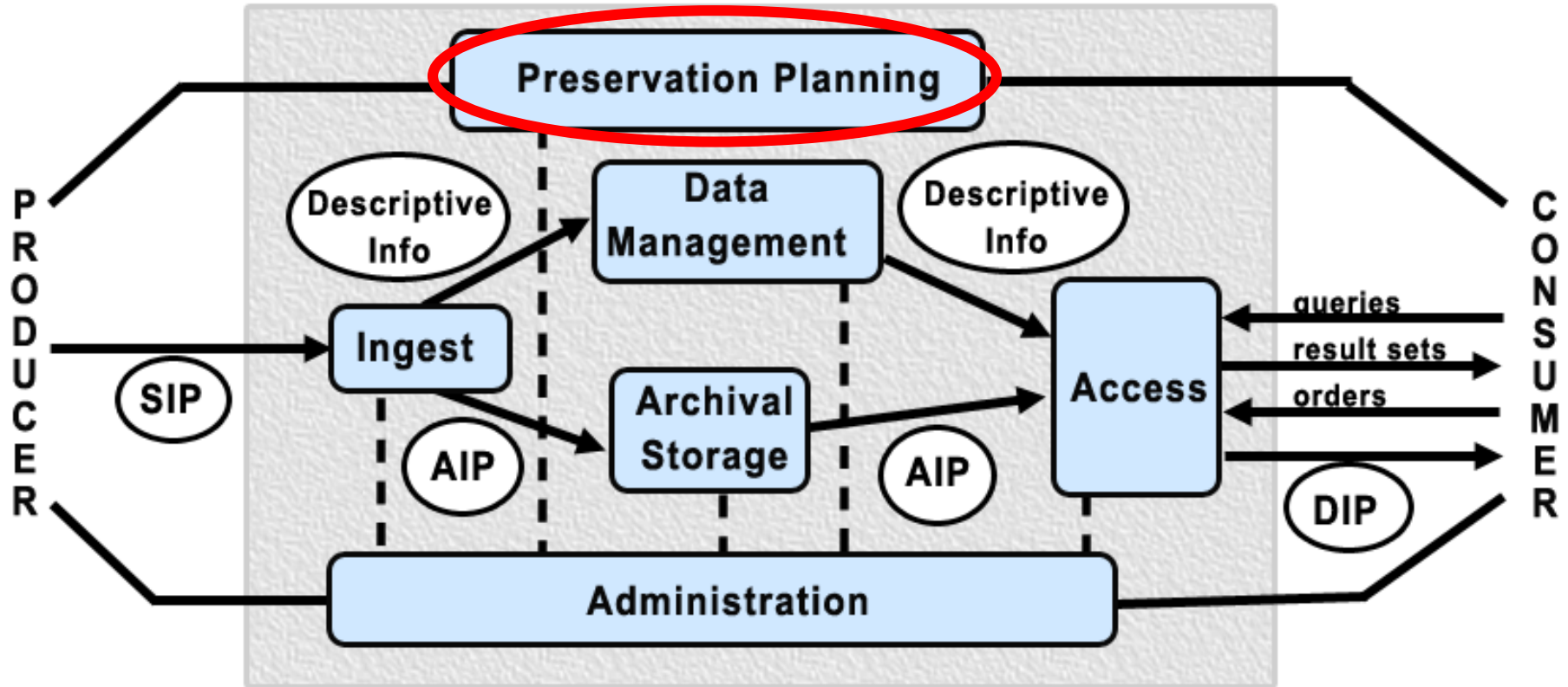


DIGITAL PRESERVATION
BUSINESS CASE
TOOLKIT



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Open Archival Information System (OAIS)



[DPC's Tech Watch Report: Introduction to OAIS by Brian Lavoie](#)

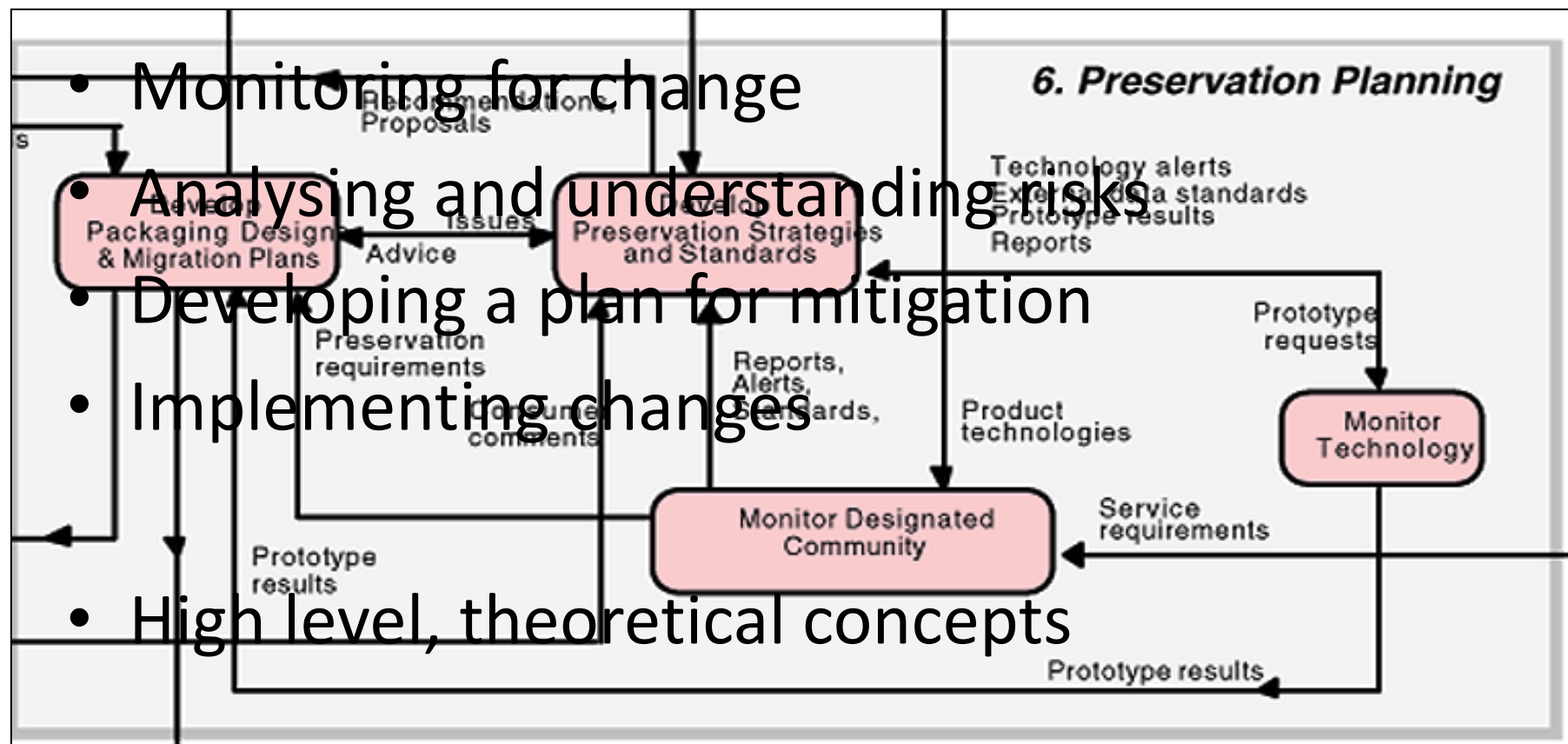
Paul Wheatley

paul.wheatley@dpconline.org

@prwheatley

www.dpconline.org

Preservation Planning in OAIS



- Monitoring for change
- Analysing and understanding risks
- Developing a plan for mitigation
- Implementing changes
- High level, theoretical concepts



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Preservation Planning in practice

- [Plato](#): a set of software tools that implement the theoretical preservation planning concepts of OAIS



- Much more detail, adds new concepts, makes it practical
- Provides a step by step process for the user
- Provides a mechanism for sharing plans and understanding

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www.dpconline.org

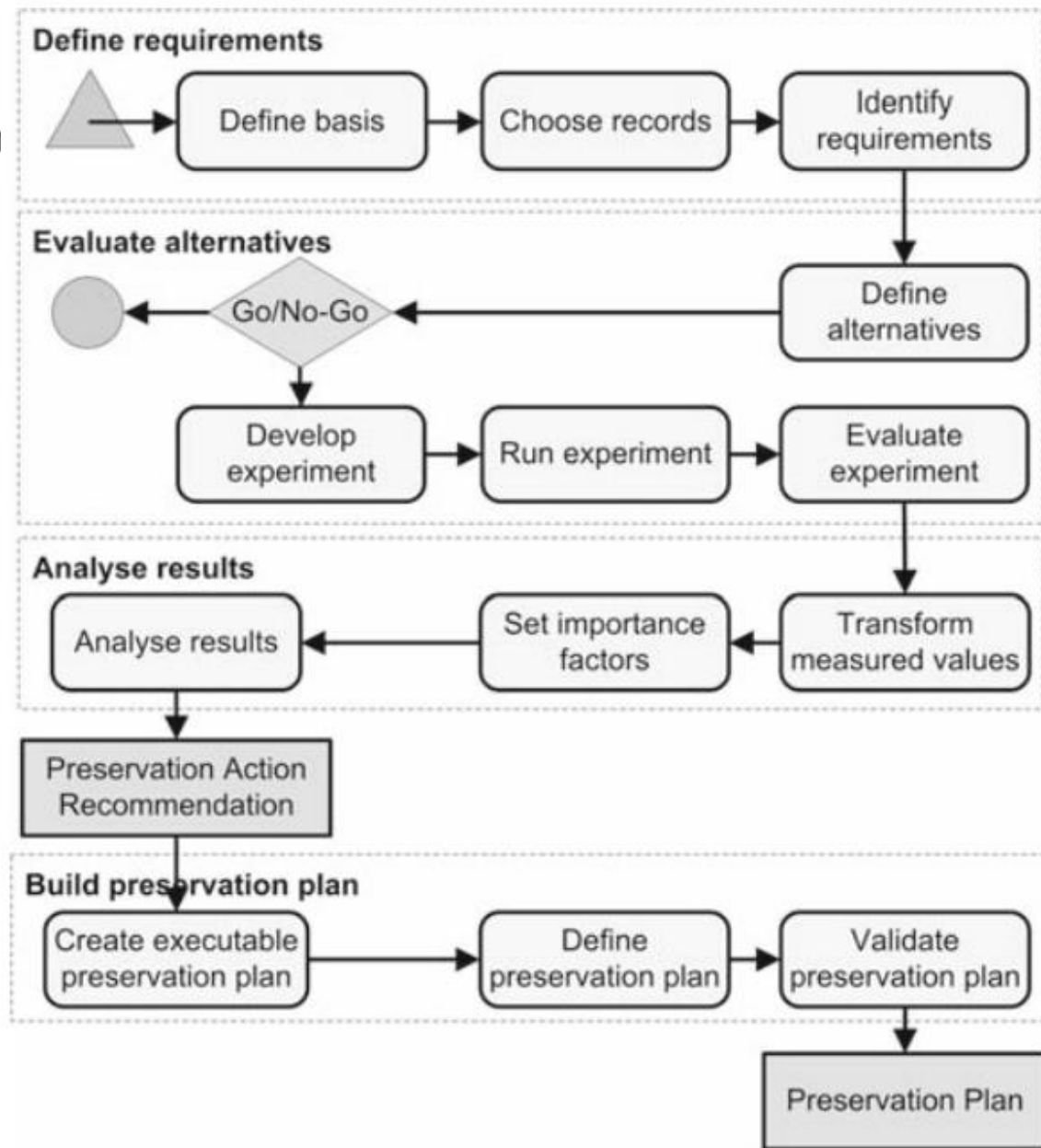


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The Plato planning process

Diagram taken from: ["Systematic planning for digital preservation: evaluating potential strategies and building preservation plans"](#)

Christoph Becker, Hannes Kulovits, Mark Guttenbrunner, Stephan Strodl, Andreas Rauber, Hans Hofman



Paul Wheatley

paul.wheatley@dpconline.org

@prwheatley

www.dpconline.org



The good news

- Lots of iterations of development addressing user feedback
- Support for monitoring: “Preservation Watch”
- Can go beyond a stand alone decision support process, integrating with many software components
- Documents decisions in a consistent manner
- Ensures comprehensive and best practice approach



The not so good news

- Appears intimidating, but the bar to entry is actually quite low
- Some of the newer automated components of the toolset are unproven

Preservation Planning in 12 Questions

1. Why do we want to keep this stuff?
2. For whom are we keeping it? How do we test their expectations?
3. What are our preferred preservation approaches?
4. What is the collection? How does it break down?
5. What risks do the different parts of the collection face?
6. What are the highest priorities for action?
7. What actions should we take to meet them?
8. What tools do we have available to carry them out?
9. What are our constraints in terms of cost / resources?
10. What are our expectations of quality?
11. How will we validate our plans?
12. How and when will we update our plans?

Paul Wheatley

paul.wheatley@dpconline.org

[@prwheatley](https://twitter.com/prwheatley)

www.dpconline.org