

Coordinating an Interdepartmental Rapid Assessment Model

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**DPC Technology Watch
Guidance Note**

December 2025



Digital Preservation Coalition

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ISSN: 2048-7916

ISBN: 978-1-918449-00-6

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1 Introduction

The Rapid Assessment Model (RAM) is a maturity model for digital preservation that was first published by the Digital Preservation Coalition (DPC) in 2019 (Digital Preservation Coalition, 2024). Originally developed through a collaborative project with the UK's Nuclear Decommissioning Authority and based on a maturity model published by Adrian Brown of the UK's Parliamentary Archives (Brown, 2013), it was designed to provide a lightweight and 'rapid' tool for measuring digital preservation maturity across eleven different capabilities. As well as providing a framework for assessing current maturity, the model also encourages continuous improvement, enabling organizations to establish targets and goals for future work.

This Guidance Note shares strategies that cover advocating for, coordinating, and completing an assessment using the DPC's Rapid Assessment Model (DPC RAM) with an interdepartmental team. It is based on the author's experience of leading the Digital Preservation Working Group (DPWG) at the University of Pittsburgh Library System (ULS) through a DPC RAM v3 assessment and is illustrated throughout with practical examples of how this activity was planned and coordinated to maximise the benefits of the exercise. This case study describes the first use of a formal assessment tool to measure digital preservation maturity by the ULS.

2 Advocating for an interdepartmental assessment

Before beginning a maturity assessment using DPC RAM at ULS, it was important to ensure there was support at a senior level. There are many obvious benefits of carrying out a collaborative exercise like this. For example:

- Completing an assessment in this way will make clear the different ways digital preservation activities impact, and are impacted by, other services offered throughout the library system.
- Recognizing the mutual interdependence of library services and digital preservation helps identify gaps in current arrangements, workflows, and processes.
- Working to address the gaps highlighted would offer opportunities for streamlining and advancing digital preservation activities.
- Collaborations between departments would create better understanding of, and greater involvement in, digital preservation activities, thereby enhancing the Digital Preservation Program through more unified support.

Providing senior colleagues with relevant information about the Rapid Assessment Model helped give context to these discussions, describing what an assessment would involve, as well as demonstrating that this work offered possibilities for collaborations and integrations that may not currently exist within the organization.

When advocating to the Associate University Librarian supervising the Archives & Special Collections, it was important to note that the group's current position was completely reactive: patching gaps in the digital preservation program with new activities, projects, tools, and workflows only in response to acquisitions and ULS needs as they occurred. Reviewing the RAM documentation and discussing how bringing together focused groups to consider the capabilities suggested in this documentation would be a step toward building a planned, cohesive future for the digital preservation program. This would provide a solid foundation for selecting and dedicating resources as well as improving efficiency in preserving and delivering digital archival assets. It was clear that the ULS Digital Preservation Working Group (DPWG) was an excellent seed group for this project since it brought together individuals from IT Support and Systems Development and the Metadata and Discovery Unit, as well as the Digital Collections Coordinator, Collection Archivists, the University Archivist, and

the Associate University Librarians leading the Archives & Special Collections and Communications and Technology departments.

It was also necessary to advocate for the support and buy-in of colleagues who would be involved in the assessment. Without full participation, discussions would not yield the information needed to recognize the intersections of current work and identify areas for improvement. Considering questions like, “How can I make my colleagues interested?” and “What will make them excited to participate?” was a good starting point. Communications thus focused on providing colleagues with a simple and convenient way to become familiar with the project, and ensuring they were able to exchange opinions and ideas without feeling they had to become digital preservation experts themselves.

The strategy for carrying out the RAM assessment was shared with colleagues in a lightning talk presentation at a DPWG meeting. This presentation provided resources that colleagues could review on their own, opportunities for questions, comment and discussion, and time to address concerns. A methodology for the assessment exercise was suggested that reused existing resource and communication channels. This included creating a working area to store all relevant documentation including the RAM model and templates, working documentation, and discussion notes. It also included the reuse of standing DPWG meetings to hold one discussion for each capability. These steps ensured that colleagues would conduct this assessment within familiar territory, have easy access to relevant materials at all times, and avoid the introduction of extra meetings to busy schedules.

3 Coordinating an interdepartmental assessment

The ULS DPWG meets regularly, twice each month, via Microsoft Teams. By reusing these meeting hours to discuss each RAM capability one at a time, the assessment would take nearly six months to complete. Although the group was willing to make this commitment, taking six months to complete initial discussions felt contradictory to RAM’s ethos of being “a rapid benchmarking tool”. A different approach was required. DPWG’s interdepartmental membership includes expertise in all the areas covered by the RAM capabilities. However, not all members are experts in all of these areas. Therefore, to reduce the length of time needed to complete the assessment, a strategy to create tightly scoped 30-minute discussions was used. To ensure that each meeting was as focused as possible, only DPWG members with expertise in each area would be required to attend. For example, the Head of Metadata and Discovery Unit, Digital Collections Coordinator, and Electronic Records Archivist would be invited to the discussion of the Metadata Management capability, but other group members would not be required. This strategy allowed the necessary discussions to take place whilst making the best use of everyone’s time. It also took advantage of the fact that many groups contained the same individuals or differed by only one individual, as the list of RAM capabilities was reorganized to more efficiently utilize each hour block. By pairing capabilities with similar attendees, each meeting introduction would only be done once, no time would be lost as individuals either left or joined a meeting, and colleagues would be required to attend fewer meetings.

Clear and informative meeting invitations were created by the assessment lead. Given colleagues would receive several of these invitations, clarity on the purpose for each meeting was key. Subject lines included the RAM capability that would be discussed and the date and timings for each discussion. Meeting invitations were worded as a request for participation rather than a demand, and allowed recipients to decide if the topic was one for which they could offer input. This approach also gave colleagues the option to suggest other individuals they felt should be present. Invitations

included a copy of, or a link to, the full text of the DPC Rapid Assessment Model, information about the specific capability to be discussed, and the table from the RAM guide providing illustrative examples for that capability. Some basic guidance on how to use the model was also provided. The invitations encouraged colleagues to ask questions, express concerns, and offer any feedback they might have. Reminders were sent before each meeting, both one week and two days before each discussion, and all relevant information was repeated. Keeping group members informed and offering them the opportunity to question the process lowered the barriers to participation and increased engagement.

Quality discussions often begin with well-planned agendas. Although discussions about a specific RAM capability appeared to have a clear scope and focus, it could not be assumed that colleagues would have capacity to review the information on that capability thoroughly before the meeting. It was also noted that many colleagues involved in the assessment process were not digital preservation specialists themselves, and may have a different understanding of the terms and concepts in use within the model. Creating a thoughtful and well-planned agenda with opportunities to define terms and ask questions before getting discussions started was important.

The DPWG used a single running document for all RAM meetings, to record, organize, and distribute what was discussed at each meeting and serve as a quick reference for group members to utilize before, during, or after meetings. It was available only for DPWG members, all of whom could view and add to it throughout the assessment. It offered a safe space to provide opinions and feedback. This document was created before any meetings began and included complete information for all future meetings. The design included a section for each capability beginning with the date and time of the meeting, a link to a document containing the table for that capability only, a consistent location to note the final score selected, a minimum of three prompts for each capability (guiding colleagues to consider how local collections or activities would be impacted by various points in that capability's table), and a notes area.

To collect the many perspectives of colleagues, the assessment lead aimed to have minimal involvement in the discussion, instead focusing on guiding the group as needed. This included ensuring colleagues were approaching the model in a consistent way – for example, reminding them that the examples in the model should not be treated as checklists of requirements that must always be met before the respective level is attained, and that the assessment scoring will be based on the local definition of a successful digital preservation program, noting that the examples included within RAM are generic and may not all be applicable to the local environment's needs or goals.

The assessment lead was ready to offer encouragement as needed to break a silence. This could involve asking colleagues to elaborate on a point or asking them to offer a definition for the topic in question. Bringing discussions back on track where necessary was also part of this role.

Time keeping was important. A 30-minute meeting block used effectively and efficiently could produce quality results. Where the group decided on a final score before the end of the allotted meeting slot, it was possible to accept that decision and conclude the meeting early. Overextending meetings was avoided in order to reduce frustration for attendees and maintain engagement as the project continued. At the close of each meeting, the assessment lead recapped and summarized discussions and assisted in negotiating a final score where required.

4 Completing an interdepartmental assessment

With discussions completed and notes collated, the DPWG utilized the Excel Spreadsheet provided alongside RAM to prepare for the next portion of the assessment: setting goals, prioritizing, and

planning next steps to meet them. Within the worksheet, final scores and highlights from the discussion notes were added for each capability. As discussions around the next steps were relevant for all members of the DPWG, time already set aside for regular meetings was used and the second meeting of each month was dedicated to work focused on RAM.

The DPWG decided to cover three capabilities per meeting. This created three 20-minute blocks to focus solely on goals for each RAM capability and choose whether to continue at the current maturity level or to plan to improve. For this new portion of the assessment, it was just as important to send reminders about upcoming meetings, keep colleagues informed about which capabilities would be discussed, offer links to RAM resources, and include conversation prompts as it was for the initial discussions. During this portion of the assessment, it was sometimes necessary to steer the conversation away from trying to force concepts, ideas, aspects, that were not immediately applicable to the local program. In some cases, it was accepted that a valid outcome may be to simply hone work in a particular area to more comfortably sit at the current maturity level rather than pushing to reach the next level, which may have been challenging to achieve. Discussions needed to set realistic expectations for the digital preservation programme going forward.

Now goals have been set, work on the Digital Preservation Forward Plan is underway. The project lead is responsible for documenting, updating, and reporting on goals, tasks, and other information related to progress, and group members will be encouraged to review this documentation and provide feedback or corrections as needed. The DPWG will create a simplified, stand-alone roadmap for the local digital preservation program. This will be used during regular DPWG meetings as an overview of the program's status, a reminder of goals, and a starting point for collecting updates on progress.

5 Conclusion

Although the time and effort required for a collaborative assessment using DPC RAM is greater than if this exercise had been carried out by a single individual, it is clear there are many benefits in taking this interdepartmental approach. This case study shows how carrying out the assessment with a larger team enhanced the support for and potential impact of a RAM assessment, providing an opportunity to raise the profile of digital preservation activities and move beyond the archival silo. The collaborative assessment provided an opportunity to share knowledge of digital preservation capability and goals across library services and teams, and demonstrated to colleagues how digital preservation relates to different areas of work across the library. The assessment has provided a broad foundation for future planning and created a solid support system for program development, allowing the DPWG to set a baseline for future assessments. Most importantly, the use of DPC RAM in this way has moved digital preservation program activities from being primarily reactive, to a more proactive, planned and measured approach. Now this maturity assessment has been completed once, it will be more straightforward to repeat the exercise in subsequent years, providing a more rapid method for the group to check in on progress and take steps towards the goals that have been set. The framework provided through RAM will also provide an ongoing tool to communicate and advocate for the work that is being done to establish and embed digital preservation activities within the University of Pittsburgh Library System.

6 References

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