



## **What's It All About: Scene Setting and Overview for the Day**

**DPC/Planets: Digital Preservation Planning: Principles,  
Examples and the Future with Planets**

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## To Cover...

- Scene Setting
- Preservation Planning:
  - Features
  - Why you need it
  - What it does



## Scene Setting

- Objectives

The event will be an informal and interactive workshop allowing attendees to share knowledge and experience in digital preservation planning, setting strategy and policy plus first-hand experience of Planets tools and technology.

- Revised programme
- Delegate packs



# In your delegate pack today...

	<i>Forename</i>	<i>Surname</i>	<i>Organistation</i>		
1	Paul	Allatt	Imperial College London	1	Room 1
2	<b>Fran</b>	<b>Baker</b>	<b>The University of Manchester</b>	8	Room 2
3	Paul	Belli	Imperial College London	2	Room 1
4	<b>Susan</b>	<b>Bioletti</b>	<b>TCD</b>	9	Room 2
5	Matthew	Brown	TNA	4	Room 1
6	Iain	Bryant	The National Archives	9	Room 2
7	<b>Emma</b>	<b>Cavalier</b>	<b>National Portrait Gallery</b>	10	Room 2
8	Natraj	Chandrasekhar	HTC Global	5	Room 1
9	Susan	Corrigall	NAS	6	Room 1
11	Sue	Donnelly	London School of Economics	2	Room 1
10	Martin	Donnelly	Digital Curation Centre	12	Room 2
12	Alexandra	Eveleigh	Society of Archivists	3	Room 1
13	<b>Iain</b>	<b>Fleming</b>	<b>PRONI</b>	1	Room 1
14	Philip	Gale	Society of Archivists	5	Room 1
15	<b>Stephen</b>	<b>Grace</b>	<b>Centre for e-Research</b>	2	Room 1
16	Joan	Green	Wellcome Trust Sanger Institute	8	Room 2
17	Cecilia	Henriques	Direcção-Geral de Arquivos	11	Room 2
18	<b>Lee</b>	<b>Hibberd</b>	<b>NLS</b>	11	Room 2
19	Ruth	Imeson	Nottingham County Council	2	Room 1
20	Bruce	Jackson	Lancashire County Council	7	Room 2
21	<b>Sarah</b>	<b>Jones</b>	<b>DCC</b>	3	Room 1
22	Jerry	Kramskoy	BBC	10	Room 2
23	Neil	MacKinnon	Ex Libris (UK) Ltd.	12	Room 2



## Scene Setting

- Objectives

The event will be an informal and interactive workshop allowing attendees to share knowledge and experience in digital preservation planning, setting strategy and policy plus first-hand experience of Planets tools and technology.

- Revised programme
- Delegate packs
- Group work
- Final session



# What is this thing called Digital Preservation (DP)..

- Digital Preservation:

*“...all of the actions required to maintain access to digital materials beyond the limits of media failure or technological change.”*

*[Preservation Management of Digital Materials: A Handbook, 2001.]*

*“...combines policies, strategies and actions that ensure access to information in digital formats over time.”*

*[ALCTS PARS blog 2007]*



## Lest we forget...

- The key aims of digital preservation:
  - Keeping digital assets for as long as they are needed
  - Making sure they can still be accessed, regardless of inevitable changes in hardware and software
  - The assets remain an accurate rendering of authenticated content over time



## What is this thing called Preservation Planning (PP)...

- Planning:

*“The purpose of planning is to establish credible plans for undertaking the required initiative, programme, or project, and to underpin other managerial activities, including the dissemination of planning information to stakeholders and other interested parties.*

*Effective planning is of vital importance and a prerequisite for the effective achievement of any programme, project, change or event.”*

[OGC – PRINCE2 Definition viewed 07/08]

*“decide on and arrange in advance or make preparations for”*

[AskOxford.com – OED 07/08]



## What is this thing called PP....

- Preservation Planning - an OAIS functional entity:

*"provides the services and functions for monitoring the environment of the OAIS and providing recommendations to ensure that the information stored in the OAIS remains accessible to the Designated User Community over the long term, even if the original computing environment becomes obsolete"*

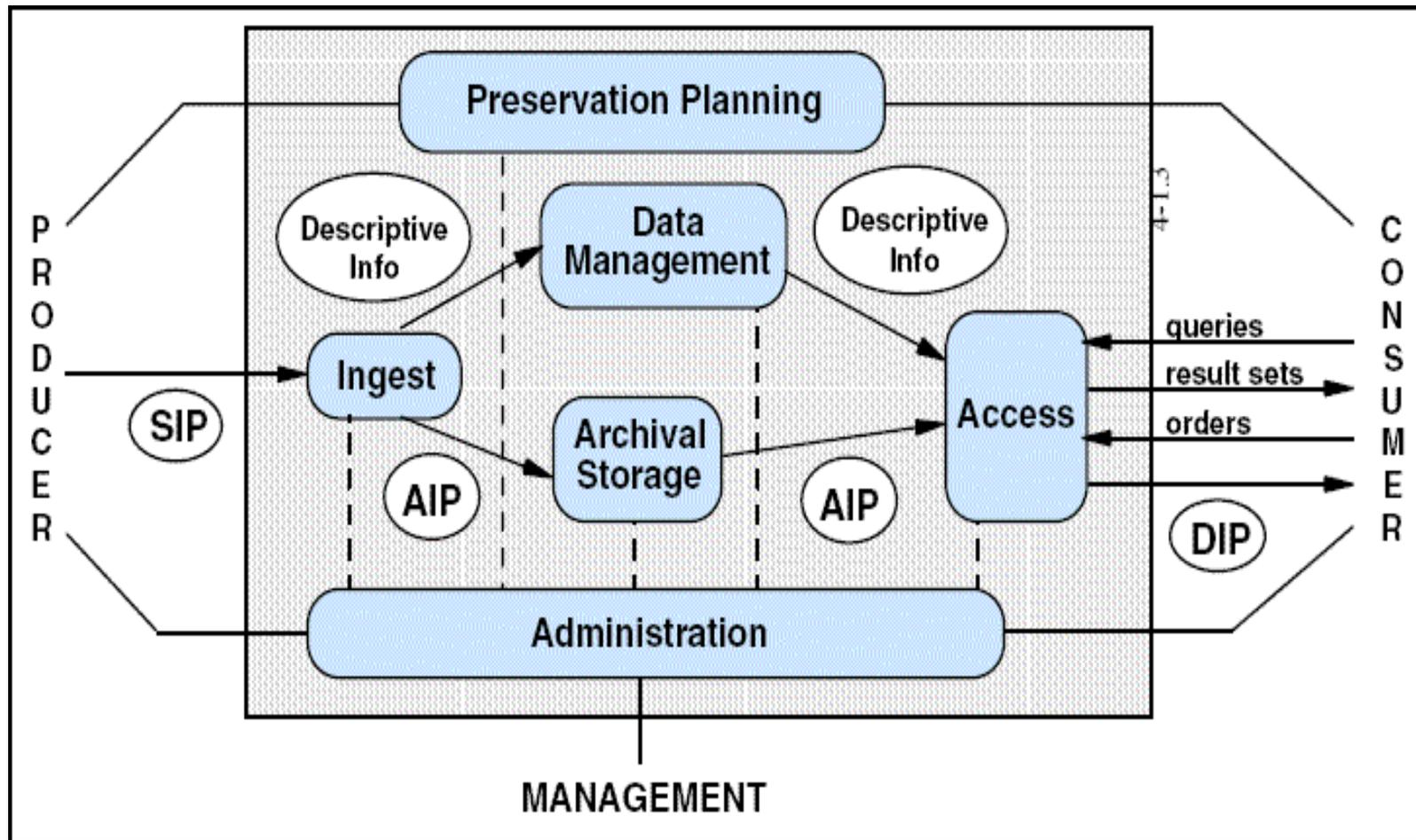
**OAIS: CCSDS 650.0-B-1, p. 4-2**

*"preservation planning is perhaps the core OAIS function."*

*"preservation planning demonstrates more clearly than other functions that digital preservation is a shared responsibility, both within and between institutions."*

**Cornell Digital Preservation Management Tutorial**

## Reminder of the OAIS functional entities



*Reference Model for an Open Archival Information System (OAIS) CCSDS 650.0-B-1 Blue Book)*

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FB



## PP in OAIS model...

- Divided into 4 functions:
  - Monitor designated community
  - Monitor technology
  - Develop preservation strategy and standards
  - Develop packaging designs and migration plans
- OAIS does not show you how .....
  - You have to join the dots



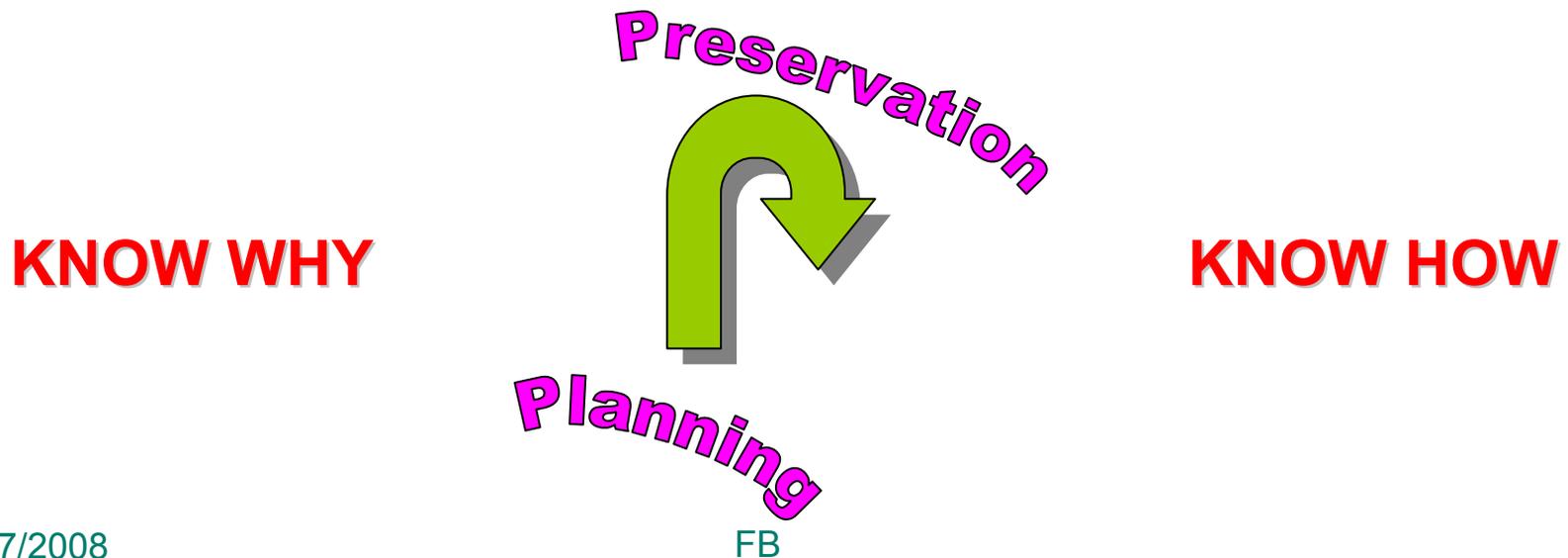
## Why Do We Need PP?

- DP can engender decision paralysis:
  - organisational/cultural
  - technical
  - resource
  - external/internal drivers on all the above
- There are choices:
  - Strategies to adopt
    - migration
    - emulation
    - technology preservation
  - Tools to support your chosen strategy:
    - PRONOM, DROID, JHOVE etc. etc.



## Why Do We Need PP?

- The growing web of choices - a maturing landscape
- PP makes dp more digestible by reducing it into byte size nuggets
- It is a logical next step from dp policies & strategies
- Transitioning from



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## Why Do You Need PP?

- How many of you have wrestled with:
  - Which strategy will best support my collection?
  - Does one strategy fit all?
  - What will the impact of my choices be?
  - How will these change with time?
  - How can I manage risk for a chosen strategy/collection?
  - Etc, etc



## What Does a PP Help You to Do?

- The 'Independent Free Republic of DP' does not exist
- Need to contextualise
- PP is a managed process which addresses each of the components in a functional way
- Some of which are....



## What does a PP Help You to Do?

- It supports decision making
- Helps you to blend your dp strategy in with other organisational policies and strategies
- To make sense to non domain experts e.g. budget holders, stakeholders, users etc.
- Provides a transparent audit trail of decisions etc



## What does a PP Help You to Do?

- Defines workflows/methodologies e.g. risk assessment
- Find out what you've got, what you need to do and....
- .....provides triggers for when to do it
- Articulate roles and responsibilities
- Develop sustainable repeatable processes



## From Dystopia to Order..

- PP facilitates a flexible approach which accommodates:
  - collection profile change
  - strategic priorities change
  - resource changes
- Outcome is an achievable solution to a particular set of circumstances
- Heisenberg 's Uncertainty – Newtonian Order



## Key message is...

(successful) Preservation planning is:

an organisational driven decision making process

NOT

a technology driven solution



**So let the 'How' begin.....**

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