***<Preservation Planning Project Plan DESCRIPTION Template, v3.0, 16Nov2021>***

*<To use this template, delete all material between the < > characters as well as the <> characters themselves; overwrite @@@ characters with the correct information; and fill in the sections of the document as appropriate. Mark those Sections not required as ‘Not needed’. Keep it brief.>*

*Title:* **@@@ @@@ Preservation Project Plan DESCRIPTION**

 **<***Insert the short name of the collection being preserved, and also the year to enable this Preservation Project Plan to be distinguished from others >*

*Abstract: <This document is a template which is to be completed prior to starting a planned set of digital preservation activities on a collection. It should be accompanied by a Preservation Project Plan CHART in an accompanying spreadsheet.>*

This document defines the digital Preservation work that will be undertaken on the @@@ collection by @@@ on behalf of @@@. The Business Sponsor for the project is @@@. *<Remove the phrases about ‘on behalf of’ and ‘Business Sponsor’ when they are not relevant.>*
**Start Date:**  @@@
**End Date:** @@@
**Person Days:** @@@
**Cost:** @@@

**Author:** @@@

**Collection Owner Approval:** @@@ <*Insert the owner’s name and the date.>*

**Sponsor Approval**: @@@ <*Insert the sponsor’s name and the date.>*

 **<***Remove this heading when it is not relevant>*

**Version and Date of this document:** @@@ <<*Insert the version number and the date.>*

**Doc Ref:** @@@@@@Preservation Project Plan DESCRIPTION, v1.0 – @@@.doc

*<This is the document's file name. Insert the short name of the collection, the year, and the date of the document.>*

**Document Amendment Record**

| **Version #** | **Date** | **Page #** | **Change** |
| --- | --- | --- | --- |
| 1.0 | @@@ | n/a | This is the first version of the document. |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

*<This page is updated when changes are made to the document after its first release****>***

**Contents List**

*<After completing the document, highlight the Contents below, do a Right Click and select the 'Update Field – Update Entire Table’ option to have the correct page numbers included.****>***

1. Introduction 4

1.1 Document Purpose and Scope 4

1.2 Document Ownership and Maintenance 4

2. Project Background and Objectives 4

2.1 Background 4

2.2 Objectives 4

3. Project Scope (CLOPDAT) 4

3.1 Collection Scope 4

3.2 Location Scope 5

3.3 Organisation Scope 5

3.4 Process Scope 5

3.5 Data Scope 5

3.6 Application Scope 5

3.7 Technology Scope 6

4. Principles, Assumptions, Constraints and Risks 6

4.1 Principles 6

4.2 Assumptions 6

4.3 Constraints 6

4.4 Risks 6

5. Project Governance 7

5.1 Project Management structure 7

5.2 Project Reporting 7

5.3 Change Control 7

6. Project Milestones and Deliverables 7

6.1 Project Milestones and approach to achieving them 7

6.2 Deliverables 8

7. Project Plan 8

7.1 Task Breakdown 8

7.2 Resource Requirements 8

8. Project Budgets and Costs 8

8.1 Budget 8

8.2 Estimated Costs 9

9. References 9

# Introduction

## Document Purpose and Scope

This document defines the scope, timescales and costs of a project which will take preservation measures to ensure that the @@@ collection stays accessible in the long term and in the face of continually changing technology. The purpose of the document is threefold: first to ensure that, in the course of constructing the document, all necessary activities are identified and planned to produce a successful result; second, to provide the information upon which a decision to proceed or to shelve the preservation project can be taken; and third, to enable the project to get off to a quick start should it be approved.

## Document Ownership and Maintenance

This document is owned and maintained by @@@.

# Project Background and Objectives

## Background

@@@ *<Describe the events leading up to the production of this document, including all activities already undertaken as part of the current Preservation exercise>*

## Objectives

The objectives of this project are to:

* make the @@@ collection accessible and usable in the long term;
* @@@*<Add any other objectives of the proposed project.>*

# Project Scope (CLOPDAT)

*<Use this section to identify all components that will fall within the scope of this project, in the categories Collection, Location, Organisation, Process, Data, Application, and Technology (CLOPDAT). Put an 'x' in one of the four central cells (Modify, Add, Remove, No Change), to indicate the action that is going to be taken on each component.>*

## Collection Scope

*<Specify the collections which are the subject of this preservation project and any other collections which may be impacted by the project.>*

| **Component Name** | **Description** | **Modify** | **Add** | **Remove** | **No change** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

## Location Scope

*<Specify all locations in which the collection is based, as well as those physical locations which will be affected by the project, and any locations that the project may need to setup or decommission.>*

| **Component Name** | **Description** | **Modify** | **Add** | **Remove** | **No change** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

## Organisation Scope

*<Specify those parts of the organisation which have responsibility for the collection, as well as those that may be affected by the project, and any parts of the organisation that may need to be modified or extended. If there is no Organisation to affect, insert ‘None’ in the first ‘Component Name’ cell>*

| **Component Name** | **Description** | **Modify** | **Add** | **Remove** | **No change** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

## Process Scope

*<Specify those processes supporting the collection and its use, as well as those that may be affected by the project, and any new processes that may need to be introduced.>*

| **Component Name** | **Description** | **Modify** | **Add** | **Remove** | **No change** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

## Data Scope

*<Specify those data associated with the collection, as well as any other data that may be affected by the project, and any new data types that may need to be introduced.>*

| **Component Name** | **Description** | **Modify** | **Add** | **Remove** | **No change** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

## Application Scope

*<Specify those computer applications, websites, cloud services or other software that support the collection, as well as any others that may be affected by the project, and any new applications that may need to be introduced. >*

| **Component Name** | **Description** | **Modify** | **Add** | **Remove** | **No change** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

## Technology Scope

*<Specify those computers, tablets, mobile phones, peripherals, networks or other hardware that support the collection, as well as any others that may be affected by the project, and any new technology that may need to be introduced.>*

| **Component Name** | **Description** | **Modify** | **Add** | **Remove** | **No change** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

# Principles, Assumptions, Constraints and Risks

## Principles

The Principles below have been followed in the construction of this Project Plan, and will be applied throughout the performance of the project:

*<Specify the principles which the project will adhere to. If there aren’t any state ‘None’ in the first bullet.>*

* @@@
* @@@
* @@@

## Assumptions

The Assumptions below have been made in the course of constructing this Project Plan: *<Specify the assumptions that have been made in defining this Project Plan. If there aren’t any, state ‘None’ in the first bullet.>*

* @@@
* @@@
* @@@

## Constraints

This project may be limited by the following constraints:

*<Specify the constraints you are aware of which will limit the way the project is performed or what the project will deliver. If there aren’t any, state ‘None’ in the first bullet.>*

* @@@
* @@@
* @@@

## Risks

There is a risk that:

*<Specify those undesirable events which you envisage might occur in the course of the project and for which you feel some contingency action should be investigated. Include the mitigation actions that will be taken if they occur. Note that these are risks to the project – they are not the risks to the collection. If no risks have been identified state “No Project risks have been identified”.>*

* @@@
Mitigation:
* @@@
Mitigation:

# Project Governance

## Project Management structure

*<Include an organisation chart showing the relationship between the Sponsor, the Collection Owner, the Approver, the Project Manager, Project Staff, and any Suppliers. Alternatively just include a list of names with their roles and relationships. Should there be no Organisation involved, state something like “Not applicable – the collection Owner, @@@, is also the Sponsor, Project Manager and Project Staff.”>*

@@@

## Project Reporting

<*Include the text below suitably modified to meet your requirements. Alternatively, specify that project reporting will not be performed and the reason why.>*

The Project Manager will send a progress report to @@@ on @@@ afternoon each week in the body of an email message. The progress report will have 6 headings:

* ***Overall Status:*** either Red (serious problems), Amber (key decisions needed), Green (OK), Blue (Complete).
* ***Achievements this week:*** deliverables produced, milestones achieved, tasks completed.
* ***Plans not achieved:*** deliverables/milestones/tasks that were planned to be completed but have not been, and the actions necessary to regain the lost ground.
* ***Activities next week:*** deliverables/milestones/tasks that will be worked on next week.
* ***Key Issues:*** status of key issues.
* ***Key Risks:*** status of key risks.

## Change Control

The baseline for this project will consist of:

* This Preservation Project Plan DESCRIPTION document
* The Preservation Project Plan CHART document
* @@@< Name any other document involved, or remove this bullet.>

<*Include the text below suitably modified to meet your requirements.>*

Any change to the Baseline will be documented on a Project Change Request and approved by the Project Manager or the Collection Owner. The Project Manager will record the decision in a Change Log and ensure that the appropriate baseline documents are updated to reflect the agreed change. Changes to this Preservation Project Plan DESCRIPTION document will be recorded in the Amendment Record at the front of this document.

# Project Milestones and Deliverables

## Project Milestones and approach to achieving them

The key project milestones are listed in the table below:

*<List the primary milestones that the project must achieve and outline the way in which they will be achieved. It is advised not to have fewer than 4 or more than 10 milestones.>*

| **#** | **Milestone** | **Approach to achieving the Milestone** |
| --- | --- | --- |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |

## Deliverables

The deliverables listed below will be produced. The approver will be the collection Owner.

*<List the names of the main project deliverables. Modify the sentence about who will approve the documents to meet your requirements.>*

1. @@@
2. @@@
3. @@@

# Project Plan

## Task Breakdown

*<Define a high level plan for the project using the Milestones identified in section 6.1 as the high level tasks. Add additional high level tasks if necessary - including one to "Manage project" if required. Break each high-level task down to the next level, numbered, for example, 1.1, 1.2, 1.3 etc., and estimate resources (for example, ‘PAW – 3’) and end dates for tasks at that level. In the Deliverables column, insert one or more of the Deliverables listed in section 6.2 as appropriate>*

| **Task No** | **Task Name** | **Resource (initials - days)** | **Deliverable Produced** | **Start Date** | **End Date** |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## Resource Requirements

*<Add up the days for each resource and specify the period during which their input will be required. If no Cost will be incurred, specify ‘n/a’.>*

| **Initials** | **Type/Name of resource** | **Total days** | **Cost** | **From** | **To** |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

# Project Budgets and Costs

## Budget

*<Document the budget allocated to the project and who is providing the money. Alternatively specify that this section is not needed and the reason why.>*

The budget allocated for this project is @@@ and is being provided by@@@.

## Estimated Costs

*<Document how much you estimate the project will cost including all internal staff costs, supplier charges, hardware etc. Itemise the expenditure. Decide whether or not to include ongoing expenditure once the project has been completed. If there are few costs, dispense with the table and just provide a summary sentence.>*

| **Cost Element** | **Internal Costs** | **External Costs** | **Total** |
| --- | --- | --- | --- |
| Internal staff costs |  |  |  |
| Contract staff costs |  |  |  |
| External contracts |  |  |  |
| Hardware purchases |  |  |  |
| Software purchases |  |  |  |
| Other purchases |  |  |  |
| Training costs |  |  |  |
| *<Other costs>* |  |  |  |
| **Total Project Expenditure** |  |  |  |
|  |  |  |  |
| Ongoing expenditure @@@ |  |  |  |
| Ongoing expenditure @@@ |  |  |  |
| **Total Ongoing Expenditure** |  |  |  |

# References

[1] @@@

[2] @@@

**ENDS**

*<This v3.0 Preservation Project Plan DESCRIPTION template accompanies the Preservation Project Plan CHART template, the Preservation Planning SCOPING Document template and the Preservation MAINTENANCE PLAN template, to support Digital Preservation projects. It has been tested on a digital collection of over 29,000 documents and zip files, and 105,000 files in total, through two preservation cycles over a period of three years; and is now considered to be fit for purpose. It has been created by Paul Wilson as part of his Order from Chaos investigations (see pwofc.com) and is* *available for use by anyone who may find it helpful.>*