

Digital Preservation at Oxford and Cambridge

A collaborative research project to evaluate and provide sustainable recommendations for our digital preservation programmes

Devising Your Digital Preservation Policy: Learnings from the DPOC project

Posted on **11 December, 2018** by [ehalvarsson](#)

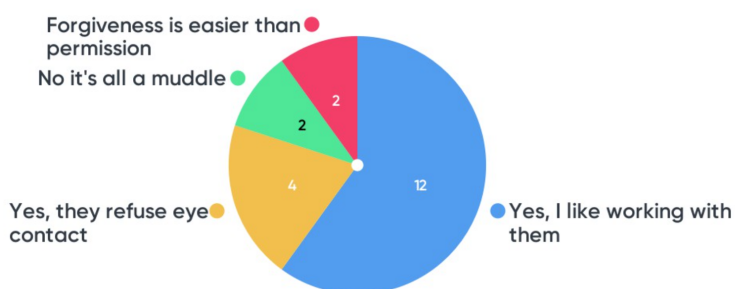
On December 4th the DPOC Policy and Planning Fellows ran [a joint workshop](#) in London presenting learnings and experiences of policy writing at CUL and Bodleian Libraries. Supporting the event were also Kirsty Lingstadt (Head of the Digital Library at the University of Edinburgh) and Jenny Mitcham (Head of Good Practice at the Digital Preservation Coalition). Kirsty and Jenny talked about their experience of policy writing in other organisational settings, illustrating how policy writing must be tailored to fit specific institutional contexts but that the broad principles remain the same.

In total 30 attendees partook in the workshop which mixed presentations with round table discussions. To make the event as interactive as possible [Mentimeter](#) was used to poll attendees on their own experiences of policy writing. Although the survey only represents a small selection of organisations in the process of writing digital preservation policy, the Fellows wanted to share some of the results in the hope that it will facilitate further discussion. Feel free to use the comments section below to let the project team know if the results from the poll seem familiar (or perhaps unfamiliar).

Question: Do you know who to consult on a digital preservation policy (in your organisation)?

Do you know who to consult on a digital preservation policy?

Mentimeter



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Most workshop participants knew who they needed to consult on digital preservation in their organisation and also had a good working relationship with them. This is the first step when starting a new policy – knowing your organisational culture and context.

Being new to their organisations, the DPOC Fellows spent a lot of time early on in the project reaching out to staff across the libraries. If you are also new to your institution, getting to know those who have been there a long time is an important starting point to understanding what type of policy will suit your organisation's culture before you begin any writing.

Question: What barriers can you see to developing a digital preservation policy (in your organisation)?

What barriers can you see to develop a DP policy?

Mentimeter



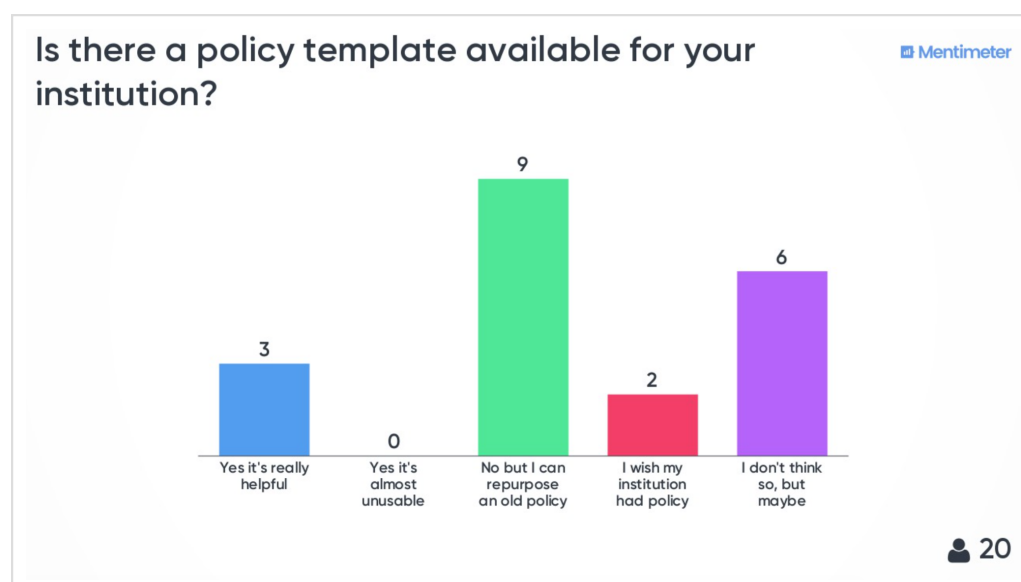
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'Time' was identified as by far the largest barriers to writing new digital preservation policy by participants. And it is true that policy development does

take a lot of time if you want the resulting document to be more than 'just a paper' which is filed away at the end of the process.

To get staff onboard with new policy, allocating resources for policy consultation is therefore crucial and the effort involved is not always appreciated by senior management. For example, it took the Fellows between 1-2 years to develop a new digital preservation policy for their organisations, illustrating why it is important to give staff sufficient time to write policy. While policy consultation took a long time, the DPOC Fellows felt that this was a worthwhile investment for their organisations, as time spent consulting on policy was also a great outreach and learning opportunity for the organisations as a whole.

Question: Does your organisation have a policy template?

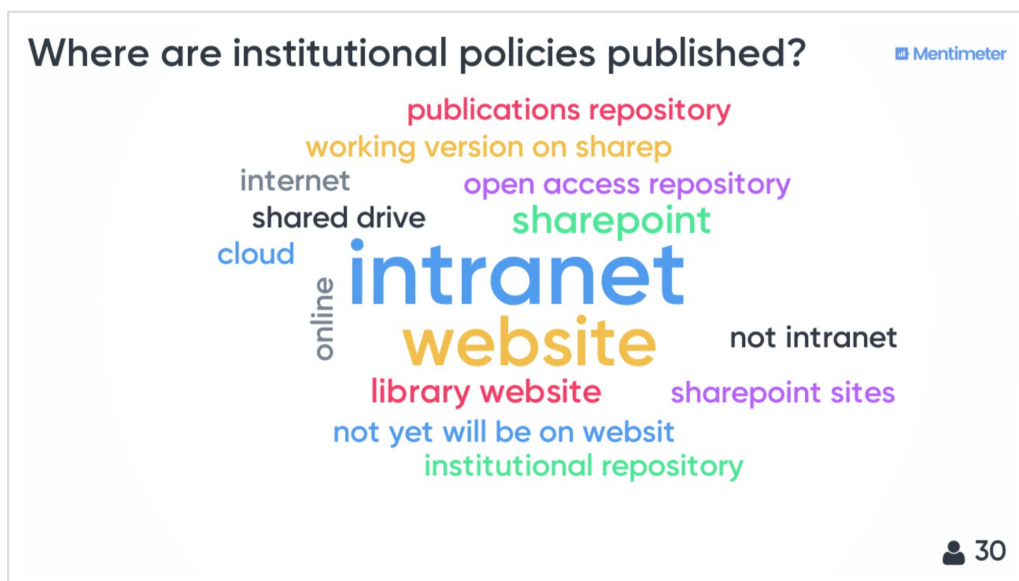


Most participants did not have an organisation wide policy template. However, templates are part of policy best practice. A policy template is a skeleton document which outlines high level sections and headlines which should be included in every organisational policy regardless of topic – from an HR policy to a digital preservation policy, they should all follow the same structure. The purpose of having these standardised headlines is to ensure that staff can easily digest and recognise any policy at a quick glance. Templates can also enforce good document management practices.

If you are interested in finding out more, a high level policy template which was developed for the DPOC project can be requested through the DPOC blog contact form or by emailing the [Digital Preservation Coalition](#).

Questions: Where are institutional policies publishes (in your organisation)?

Once the policy is signed off, it is time to publicise it wider. Among the workshop participants the most common places to publish policies were either on an institutional website or intranet (although there are other options listed in the word cloud).



As a word of caution, make sure that your organisation is consistent in where it publish policies and ensure that documents are versioned. The international digital preservation policy review which the Fellows undertook in 2016 (analysing 50 different policies) found that most digital preservation policies do not use any document versioning. No versioning, in combination with the proliferation of different policy publication routes in an organisation, will soon become a real issue when staff try to locate up to date documents. (Again, if your organisation has a good policy template in place you can better enforce versioning!)

One option which was listed several times in the word cloud is to publish policy in an institutional repository; this is primarily useful if you do not have a reliable records management system in your organisation. Using a repository means that you can assign a DOI to the policy for persistent referencing and also has the added benefit of becoming the clear canonical copy of the policy

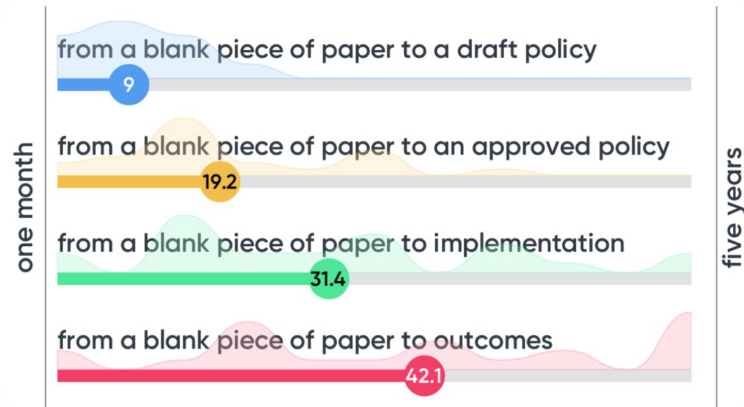
Question: How long will it take to...?

Participants were asked how long (using multiples of months) they think it would take their organisations to:

- Draft a policy
- Have it approved
- Begin implementation of the policy
- See real impact and benefits in the organisation

How long will it take

Mentimeter



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As seen from the chart, the drafting of a policy document is only one small aspect of policy and planning work. This is important to remember if you want to avoid your policy becoming just another 'piece of paper' that is filed away and not looked at again after its been written. Advocacy, communication and implementation plans continue for years to come after the original document has been drafted.

Where next...

To find out more about policy writing during the DPOC project have a look at [this recent blog post](#) from CUL's Policy and Planning Fellow Somaya Langley and at the [workshop presentation slides](#) available through the DPC. The Fellows are also happy to take questions through the blog and encourage use of the comments section.

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