Business Planning

Planning checklist

A brief list of issues to consider when developing a business plan for your organization:

- management structure (coordination, administration, technician, cataloguer, data entry, promotion)
- skill assessment and development where necessary
- staffing costs, based on range of staff involved and percentage of their time
- incidental operating expenses (travel to conferences, office supplies)
- stakeholders and arrangements for communicating with them (formal meetings, feedback, trials)
- hardware costs (scalable storage requirements) - existing or new infrastructure?
  - software licensing - commercial solution vs cost of maintaining "open source"
  - system development costs such as customization and integration with existing systems
- scope of content and designated authoritative decision makers when scope is disputed
- marketing and promotion
- population strategies - how will you obtain and enter content?
- assisted submission vs self-submission to populate repository (consider implications of both quality of metadata vs staff time)
- extent of services offered and by whom - eg the level of detail captured in the metadata
- reporting requirements (administrative, alert services, custom reporting)
- statistical requirements
- file formats, conversion and transformation services which might be required
- data entry standards
- metadata standards: taxonomies, crosswalks, metadata creation, quality control, support services
- data migration planning (ensuring data can be extracted for future solutions as well as imported)
- review cycles to assess aspects of the repository implementation such as
  - organizational goals
  - software suitability in line with organizational goals
  - stakeholder engagement and feedback
  - system uptake
  - workflows
  - process improvement

- scope of content housed
- quality issues (metadata, reporting, file formats and pending obsolescence, consistency in data entry)

Information from other institutions

- Building a business plan for DSpace, MIT Libraries Digital Institutional Repository (40K PDF)
- DSpace Lessons Learned

General resources

- Keystroke Economy: A Study of the Time and Effort Involved in Self-Archiving
- For Whom the Gate Tolls? How and Why to Free the Refereed Research Literature Online Through Author/Institution Self-Archiving, Now.