

Improving Electronic Records Programs in the SUNY System
 Electronic Records Plan Template

Strategies and Objectives: Year One	Participants	Timeline
Strategy 1. Stabilize digital content in College/University Archives and Special Collections		
Objective 1. Set up basic digital processing workstation		
Objective 2. Inventory materials		
Objective 3. Create and distribute multiple copies of content		
Objective 4. Establish fixity		
Strategy 2. Convene Electronic records preservation committee		
Objective 1. Establish committee membership		
Objective 2. Draft committee mandate		
Objective 3. Advocate for digital preservation and gain administrative support for program		
Strategy 3. Establish Program Foundations		
Objective 1. Draft mission statement for digital preservation program		
Objective 2. Draft succession plan for digital materials should preservation program end		

Improving Electronic Records Programs in the SUNY System

Objective 3. Adopt budget		
Objective 4. Set staffing plan		
Objective 5. Establish training plan		

Strategies and Objectives: Year Two	Participants	Timeline
Strategy 1. Implement Repository		
Objective 1. Repository Software selection, installation and set-up		
Objective 2. Develop processing and preservation workflows and procedures		
2.1 Integrate with recordkeeping systems		
2.2 Define acceptable transfer media		
2.3 Establish accepted file formats		
2.4 Draft transfer documentation		
2.5 Create ingest procedures		
2.6 Set storage procedures (including back-up routines)		

Improving Electronic Records Programs in the SUNY System

Strategies and Objectives: Year Two	Participants	Timeline
2.7 Define minimum metadata requirements		
2.8 Establish access procedures		

Strategies and Objectives: Year Three	Participants	Timeline
Strategy 1. Document Processing and Preservation Workflows and Procedures		
Objective 1. Draft user guides and manuals for digital repository		
Strategy 2. Write Digital Preservation Policy		
Objective 1. Define purpose of digital preservation policy and how it relates to repository's mission		
Objective 2. Establish mandate or define legal authority to collect and preserve digital materials.		
Objective 3. Define the community served by the digital preservation program		
Objective 4. Set digital preservation program objectives		
Objective 5. Define scope of preservation program		

Improving Electronic Records Programs in the SUNY System

Objective 6. Finalize staff roles and responsibilities		
Objective 7. Establish access conditions		
Objective 8. Set time-frame for policy review and revision		