

4-2023

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Benefiel, Annie, "Prioritization Matrices for Digital Preservation Planning" (2023). *Presentations*. 113.
https://scholarworks.gvsu.edu/library_presentations/113

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Prioritization Matrices for Digital Preservation Planning

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Introduction

Appraisal strategies can be leveraged to inform decision-making around digital preservation planning, lending curatorial oversight to an area that is often perceived as highly technical.

A prioritization matrix is a project management tool to help you narrow down multiple project or task options, and identify the highest-priority areas. They facilitate decision making, are customizable, and easy to read.

This case study explores the prioritization matrix methodology used by GVSU Special Collections & University Archives in digital preservation planning.

Methodology

1. Establish Selection Criteria

- Is the collection born-digital, digitized and owned, or digitized and not owned?
- Is the collection "closed" (complete) or "open" (expecting additions)?
- Is there existing online access to the content? In other words, are there online copies of access files?

2. Criteria Weight

- 1 = High priority
- 2 = Medium priority
- 3 = Low priority

3. Review and Score Collections

- Inspect digital content on network drive
- Review control files, deeds of gift, finding aids, other records

Results

I set up a spreadsheet with a column to list the collections. I then set up columns for my criteria: Born Digital vs Digitized, Closed vs Open, and Access. The final column contains the =AVERAGE function, applied to the criteria columns to determine the final priority score.

After reviewing the contents of each collection's digital file folder on our network drives, I scored them according to the established criteria. The Priority Level was generated automatically. Once all of the collections were evaluated, I sorted the spreadsheet on Priority Level Ascending, ranking the collections from highest priority to lowest.

For personal use, I sectioned off the various priority levels into groupings using colors. This method of grouping is not accessible for all, but worked well in this use case.

Using the prioritization matrix has been simple and straightforward and created a plan that prioritizes collection management based on risk, rather than ease of processing or other arbitrary factors.

	C	D	E	F	G
1	COLLECTION	Born Digital vs. Digitized	Closed vs. Open	Access	Priority Level
2	GV002-50th-Anniversary	1	1	1	1
3	GV002-50th-Anniversary-Laker-Lore	1	1	1	1
4	GV002-11_President-Cracow-University	1	2	1	1.333333333
5	GV066-Development-Photos	1	2	1	1.333333333
6	GV051-04_History-Dept-Slides	2	1	1	1.333333333
7	RHC-12-Seidman papers	2	1	1	1.333333333
8	GV043-07_Connected_Exhibit	1	1	3	1.666666667
9	GV248-01-Speaking-Out	1	1	3	1.666666667
10	DC-06_Oceana	1	1	3	1.666666667
11	JCPA-08_Michigan-Philanthropy-Oral-History	1	1	3	1.666666667
12	RHC-88 Fei Hu Films	1	1	3	1.666666667
60	JCPA-04_OSoG	1	2	3	2
61	RHC-65-Young-Lords	1	2	3	2
62	RHC-80-Oakes-vet	2	1	3	2
63	RHC-16-JimHarrisonNOPUBLISH	2	3	1	2
64	RHC-46-Literary-correspondence	3	2	1	2
65	RHC-102_Regional-history-misc	3	2	1	2
66	RHC-170_Carnival of Fun	3	2	1	2
67	COVID-19_Journaling	1	3	3	2.333333333
68	RHC-27_Vets-History	1	3	3	2.333333333
69	VetsSupplementary	1	3	3	2.333333333
108	GV012-05_PressReleases	2	3	3	2.666666667
109	DC-07_Saugatuck-Douglas	2	3	3	2.666666667
110	DC-08_Temple-Bnai-Israel	2	3	3	2.666666667
111	GV000-01_Foundationdocs-Histories	3	2	3	2.666666667
112	GV002-13-President-speeches	3	2	3	2.666666667

Note: some rows were hidden for display purposes.

Benefits

The application of this strategy provides three main benefits to digital preservation planning:

- Provides curatorial knowledge of the collections' value, IP status, restrictions, and provenance, as well as overall loss risk.
- Gives structure to decision making based on both appraised and technical needs.
- Promotes collaboration between curatorial and technical staff.

The prioritization matrix itself can be used as a project management tool, where you can record progress and decisions during preservation processing. This also protects against knowledge loss in the event of project staff turnover.

Sources

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