WASHINGTON
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Washington State Archives

Records Management Advice
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Local Records Grants:
Lessons Learned from Previous Digital Imaging Grantees

Purpose: Provide guidance shared by previous grantees with prospective Digital Imaging applicants.

- "Having the files organized and prepped for digitization, i.e., removing staples, removing duplicate records, etc., significantly increased the number of records that were able to be scanned with the money and time allowed. It was especially important to have the records indexed prior to sending to the vendor."

- "Expect some cost overruns. One example is that it's hard to get an accurate picture of historical books. Once the scanning began, we found some folded up oversized maps in our books that added to the cost of our imaging project."

- "Have your vendor pre-sample some of your records in order to avoid any mid-project surprises. We ended up having double the normal amount of images per microfilm reel, which could have dramatically increased the cost of scanning mid-project if it hadn't been caught ahead of time."

- "Keep accurate records and verify your invoices against the internal tracking, by number count. We discovered inaccuracies in the invoicing from our vendor and were able to prevent being double charged for several boxes - thereby increasing the number of boxes we were able to have digitized."

- "The digitizing needs (level of document naming/identification) for student records are different from the digitizing needs (document naming/identification) for school board and payroll/retirement. It is important to include stakeholders representing all areas/levels in order to ensure folder structure and document labeling, in the end product, meets the needs of all."

- "Reach out to the Archives—they are extremely knowledgeable and can assist you in developing a plan of action for your project!"

- "It is essential to organize your file room before applying for the digitization grant in order to get a true view of what records actually require digitization. Another significant lesson learned is to communicate with the vendor before the project, so they are aware of the documentation needs for reimbursement. Finally, I highly recommend watching or attending the grant webinar."

- "Future grant applicants should select records that are used frequently by staff members. Also, select documents that are highly requested by the public, and, if possible, upload them to your website, all of which will dramatically improve workloads, going forward."

Additional advice regarding the management of public records is available from Washington State Archives:

www.sos.wa.gov/archives
recordsmanagement@sos.wa.gov