

CHARLOTTE COUNTY ARCHIVES DIGITIZATION POLICY

Approved by the Charlotte County Board of Directors February 18, 2026

1. Purpose

1.1 Background

In September 2025, the CCA embarked on a mission to further our strategic goals of community engagement by bringing under-recognized materials to our modern audience. The course of action was to create a digitization program complete with priorities, standards, and procedures for long-term use in guiding current and future digitization projects by the Charlotte County Archives.

1.2 Objectives

Digitization was identified as an avenue to serve our current audience while reaching new audiences, to shape CCA's brand identity as a comprehensive and representative collection through our digitization priorities, to provide standards of access expectable to our modern audience, and to embark on the long-term digital preservation expected of a modern archive.

2. Scope

This document applies to all staff and volunteers of the CCA involved in the digitization of archival materials held by the CCA for the purposes of preservation and/or access. This includes persons participating in all stages of the digitization process, including selection, evaluation, image capture, and digital preservation activities.

3. Priorities

The collections mandate of Charlotte County Archives is as follows:

The collections mandate of the Charlotte County Archives is to acquire, preserve, and make accessible records of archival value, regardless of media or format, that make a significant contribution to an understanding of the history and development of Southwest New Brunswick, its natural and built environment, and the people who have lived in, worked in, or had an impact on Southwest New Brunswick.

Within this mandate, and in accordance with the objectives outlined above, our priorities for digitization are guided by the following collection principles:

1. **Regional representation of Southwest New Brunswick.** In support of our regional scope, the digital collection will aim for proportional and relevant representation of communities across the whole Southwest New Brunswick region.
2. **Encouragement of historical interest.** To emphasize the CCA's messaging that archives are for all audiences, the digital collection will make available materials likely to pique general interest.

3. **Improved access to high use materials.** The digital collection will make available online materials frequently used by our established audience, particularly those informing genealogical research, property and business records, and local heritage sites.
4. **Building new audiences.** To encourage connection with new audiences, the digital collection will incorporate materials targeting groups such as children and families, local creatives, other heritage groups, users outside of St. Andrews, and potential donors.
5. **Enhancing analogue preservation through digitization.** Fragile and unstable objects will be a priority for digitization when feasible, as a means to limit handling and increase potential for long-term analogue preservation.

4. Selection

4.1 Methods

The selection of materials to be considered for digitization can be done either

- a) By a process of archival staff choosing materials to be digitized in accordance with predetermined criteria;
- b) Or by a process of nomination, based on that same criteria, carried out periodically through calls for proposals.

4.2 Evaluation

Materials selected for digitization consideration will be evaluated in written form, using a standard evaluation form reflective of the criteria below. This form will be included in the Procedures section of the Digitization Plan.

4.3 Selection Criteria

All materials under consideration for digitization will be appraised via the following criteria:

1. **Appropriateness to digital collection objectives.** The materials fit the scope of the CCA's digital collection, furthering its objectives as evidenced through alignment with one or more of the principles outlined in Section 3.
2. **Material singularity.** No copies of the records exist in other formats, either in our repository or other institutional repositories, that satisfy our digitization objectives and institutional standards.
3. **Fit physical condition.** The material is fit to be handled for the digitization process.
4. **Current or expected demand.** The materials are frequently requested or fit within the scope of materials that are frequently requested; it is anticipated that digitization will lead to enhanced demand; and/or it is predicated that the material may draw desired new audiences.
5. **Copyright/intellectual control.** CCA is aware of the relevant laws and agreements respecting rights associated with the reproduction and distribution of the materials, and either holds clear permissions permitting the creation and dissemination of digital copies or is satisfied that the materials are in the public domain.

6. **Digital capacity.** CCA is aware of the technical standard for the digitized version of the material and has the capacity to provide that standard for effective long-term digital preservation of the material.
7. **Acceptable level of risk.** The level of risk in sharing the materials with a broader, sometimes unknowable audience is known and acceptable to the CCA.
8. **Level of description/arrangement.** The materials have an adequate level of description and arrangement to support the creation of digital records. If the digitization of a fonds without this level of arrangement is pressing, it must be arranged before or during evaluation. If arrangement cannot be completed at this time, the fonds must be passed over and returned to when more organization is possible.

4.3 Selection within a fonds

Large fonds may not be digitized in their entirety. Selection of lower level groupings or individual items will be evaluated through a separate section of the evaluation form. Fonds must be arranged to a file-level before such “hybrid” digitization.

4.4 Deselection

Certain materials may be identified as unsuitable for digitization, either for a set length of time or for perpetuity. Reasons for unsuitability may include legal or donor restrictions, condition, or format. Deselection is at the archivist’s discretion.

Deselected items are no longer viable for nomination, and their status will be clearly indicated in relevant metadata.

4.5 Digitization without dissemination

Certain materials may be classified as fit for digitization without dissemination, in which case the digital object will not be made publicly available through the CCA’s digital collection. Items within this category include those within copyright but lacking necessary permissions, where condition indicates digitization for preservation purposes, and/or where digitization is vital for effective collection management. This category also encompasses items digitized to enable access for disabled users.

5. Digital Preservation

5.1 Digital preservation standards

The CCA will take conscious actions to preserve digital objects created through digitization in accordance with present field standards. Preservation processes will incorporate a range of physical and cloud media storage technologies, lossy and lossless file types, and pre-planned schedules and routines to mitigate risks of damage to or loss of digital objects. CCA staff will adhere to the current procedures and standards described in the relevant sections of the Digitization Plan.

5.2 Asset retention and disposition

The CCA will maintain, in an organized manner, several verified digital object master copies and backups in various web-based, physical, and cloud media storage locations. These assets will be monitored and authenticated regularly, as an effort to prevent damage to or loss of digital objects.

The disposal of digital object master copies will be carried out in accordance with the CCA's Collections Management policy, and will follow current field standards and best practices.

CCA staff will adhere to the current file management standards and procedures in the relevant sections of the Digitization Plan.

5.2.1 File migration

The CCA will monitor technological advancements relevant to file preservation and will move digital objects to updated formats and environments at intervals deemed appropriate by current field standards and institutional capacity, or prior to previous versions becoming obsolete.

5.2.2 Duplicates

The CCA will make an effort to reduce the proliferation of unverified files to avoid confusion and mitigate file loss and damage, including the deletion of unverified file duplicates upon confirmation of an authenticated master copy.

5.3 Hardware refreshing

The CCA will transfer digital objects to updated physical storage devices at intervals deemed appropriate by current field standards and institutional capacity, or prior to previous versions becoming obsolete.

5.4 Administrative access

Administrative access to digital assets will be determined at the discretion of the archivist, as the CCA must limit the personnel allowed to interact with digital objects and their storage devices to reduce the risk of losing, corrupting, and irrevocably altering digital objects and their metadata.

6. Copyright

6.1 Copyright ownership

The CCA will make efforts to determine the copyright status of all materials prior to digitization and note this status on the evaluation form. The Reference section of this Digitization Plan will include up-to-date information and resources to assist in the process of copyright determination. The CCA is aware that ownership of the physical manifestation of a work does not equate to copyright ownership.

6.1.1 Public domain works

Works that CCA determines to be in the public domain in Canada may be freely digitized without further copyright considerations.

6.1.2 Copyright transfer

Works for which the copyright holder has transferred their copyright to the CCA in writing may be freely digitized, unless specific, written donation restrictions apply.

6.1.3 Copyright holder permissions

The CCA may digitize works for which it does not own the copyright with the written permission of copyright holders, and respecting any restrictions placed by the copyright holder(s).

6.2 Fair dealing

The CCA may create and distribute copies of copyrighted archival materials for purposes and in a manner protected by fair dealing under the Copyright Act and case law. Such purposes may include: research, private study, and education; parody, satire, criticism, or review; and news reporting.

6.3 Archives management

The CCA may create copies of copyrighted archival materials for the purposes of archives management and administration, such as internal record keeping and cataloguing, and for insurance or police investigation purposes.

6.4 Preservation

The CCA may create copies of copyrighted archival materials for the purposes of preservation and collections management, only to be accessed on-site by CCA staff and volunteers. This includes but is not limited to the copying of archival materials in poor or fragile condition, at risk of loss or deterioration, undergoing restoration processes, or where the material itself or the technical environment required to access the material is becoming obsolete.

6.5 Accessibility

The CCA may create copies of copyrighted archival materials for the purpose of providing an alternate accessible format to a disabled user/user with disabilities, to be accessed on-site or distributed in accordance with copyright law and with respect to user needs. The CCA will always strive to provide an equitable archives experience to all its users.

6.6 Moral rights

The CCA will uphold the moral rights of creators, making efforts to avoid modifications to any copyrighted materials that could damage or alter the reputation of the creator and the work.

6.7 Risk management

The CCA recognizes that determination of copyright and adherence to copyright laws can be difficult, and the digitization of materials not clearly in the public domain or for which the CCA directly holds the copyright can never be completely risk-free. The CCA will make good faith efforts to act within copyright parameters, but may accept a low level of risk where the institutional and/or user benefits of digitization and/or dissemination are deemed significant.

6.7.1 Copyright notice

The CCA is aware of its role as agents of our users engaged in copying and recognizes its responsibility to post a clear notice of copyright considerations to users. A general statement will be posted in all venues where users may access materials, including our online collections and research room, and included in reproduction request forms.

6.7.2 Takedown policy

The CCA will adhere to a takedown policy covering the strategy for copyright complaints, investigation, and potential removal of materials from our public-facing digital repositories. This policy will be shared publicly on our website and online collections.

7. Digital objects

7.1 Imaging standards

The CCA will adhere to current field standards for the image capture of archival materials, maintaining awareness of and implementing modifications to these standards as they occur. Current imaging standards will be described in the Standards section of the Digitization Plan.

7.2 Filename standards

The CCA will maintain an organized digital object file naming system, recognizing that file names are important metadata integral to the usability and preservation of digital objects. CCA staff will act in accordance with current file naming standards, described in the Standards section of the Digitization Plan.

7.3 Transmission

The CCA may transmit digital objects across its digital collections platforms and social media for any purpose deemed appropriate by the CCA. During transmissions, the CCA will act in good faith regarding its stakeholders, including the creators of the materials transmitted, the persons and communities represented within the materials, and the institution itself.

8. Metadata

Metadata will be created and stored in multiple locations, at various levels of arrangement, throughout the digitization process. The CCA endeavours to capture a field-standard amount of metadata with copies across platforms and storage formats to increase the likelihood of contextual preservation in the event that any single storage format is lost in the future. For more see the Standards section of the Digitization Plan.

9. Digital arrangement

The CCA will maintain equivalency of archival arrangement between digitized fonds and their analogue counterparts through field-standard metadata practices and file organization systems across all platforms and devices engaged in file storage and distribution.