

WPLC Collaborative Digitization Work Group Recommendation – November 4, 2015

Summary

The Collaborative Digitization Work Group recommends that the WPLC Board allocate \$9,250 in 2016 to support coordinated training, education, and shared access for cultural heritage digitization projects.

Need

A collaborative approach to digitizing and providing access to archives and other local historical resources will enable systems to be more efficient and keep them from “reinventing the wheel,” while ensuring that systems and member libraries are working in ways that will allow them to provide patrons with access to unique collections on the statewide level, through Recollection Wisconsin, and on the national level, through the Digital Public Library of America.

The Work Group emphasized that support for cultural heritage digitization projects is in high demand from member libraries. Interest in these kinds of projects is accelerating, and systems need to get ahead of this demand before more libraries forge ahead on their own and establish collection silos that may not meet shared standards for quality, interoperability and discoverability.

Systems that have already undertaken collaborative digital cultural heritage projects with member libraries highlighted the importance of local relationships to build buy-in for these projects – both the system-to-library relationship and the relationships between libraries and local historical societies, genealogical societies or other community organizations. These systems noted that training is essential, and that workshops or other group training activities were most effective when followed by one-on-one consulting/support to individual libraries.

The Work Group identified four main priorities: 1) Coordinated training and information sharing; 2) Shared solutions for access to content; 3) Shared solutions for long-term storage of content and ongoing digital preservation management; and 4) Coordinated approaches to scanning/reformatting original materials. Overall, building on existing infrastructure (servers, software licenses, training networks, etc.) is preferable to starting from scratch wherever possible.

Recommendation: Training and Information Sharing

The Work Group recommends that WPLC budgets **\$7,500** in 2016 to support the development of a training curriculum and information sharing procedures in order to help build a statewide community of practice around digitization issues including copyright, scanning, metadata and digital preservation. These activities would be coordinated and carried out by the Recollection Wisconsin collaborative statewide digital program. Recollection Wisconsin would provide a maximum of 100 hours of work at a rate of \$75/hour.

Activities would include:

- Development and delivery of a web-based “train-the-trainer” curriculum to enable CE Coordinators or other system-level staff to provide basic digitization

education and support to member libraries. The WPLC OverDrive Support Course is a potential delivery model for this approach.

- Curriculum development (10 hours)
- Delivery of two sessions of course, including preparing feedback, followup support, etc. (20 hours)
- Creation and maintenance of a directory of relevant equipment, consulting, internships, and other resources for digitization projects available to public libraries in Wisconsin from academic libraries, library schools, public libraries and systems, cultural heritage institutions, and third-party vendors.
 - Develop directory criteria and method for sharing information (5 hours)
 - Identify institutions that can provide equipment, consulting, internships or other services; coordinate with institutions to document available services, processes, etc. (15 hours)
 - Distribute Request for Qualifications (RFQ) to digitization vendors; compile and distribute responses (8 hours)
- Creation of guidelines, templates, and other documentation to assist small/under-resourced libraries in creating and maintaining digital projects and to enhance standardization of digital collections at the statewide level. Needed documentation identified by the Work Group includes metadata templates, sample permissions/release forms, best practices for evaluating physical collections and selecting materials for digitization, and sample language for successful grant applications.
 - Conduct research to identify available documentation and examples (5 hours)
 - Create documents, including review by experts and community members (25 hours)
- Information sharing about grants, pointing towards potential collaborative grant applications.
 - On a quarterly basis, identify available regional, state, and national grants; share this information with the WPLC community in order to encourage collaborative grant applications around specific types of materials, topics, communities, etc. (3 hours/quarter - 12 hours total)

Recommendation: Access

Providing patrons with access to digital heritage content requires specialized software, as does sharing that content on the statewide level through Recollection Wisconsin and the national level through the Digital Public Library of America. Startup and maintenance costs for any software platform are significant, whether that means the monetary costs of commercial software licensing and hosting or the staff time and expertise necessary to implement open-source solutions. Scaling up and approaching access collaboratively will lead to significant cost savings for systems, especially as demand from member libraries continues to grow. For example, OWLS and NFLS together maintain a CONTENTdm instance (hosted by OCLC) at an annual cost of \$3,000; as they reach the upper limits of their 10,000-item license, they face the decision of upgrading (at an initial cost of \$10,500 and an annual fee of \$7,000 thereafter) or transitioning to an open-source platform (estimated \$15,000 up-front support time to implement and migrate content; \$1,800-\$3,000 annually for self-hosted server).

The Work Group recognizes that there is no one-size-fits-all solution to the question of access, and that several systems and individual libraries have already invested resources in adopting and maintaining platforms. For systems in need of an access solution, one recommended option is to use the CONTENTdm server and unlimited CONTENTdm license available from Milwaukee Public Library in partnership with Recollection Wisconsin. This solution provides a balance between the local/regional customization and branding desired by systems and individual libraries, and the streamlining and standardization of procedures that the use of a shared platform will facilitate. It also enables systems and libraries to benefit from significant CONTENTdm expertise available in the state and leverages the substantial financial investment that MPL and RW have made in the platform over the past decade.

Costs to support the shared CONTENTdm platform would be covered in part by individual systems and in part by WPLC:

- Each system that chooses to make use of the shared platform would cover costs for collection configuration and customization (\$200 per collection) as well as costs to coordinate the uploading of content and data to the platform (system is trained in use of the software to manage uploading for member libraries, or Recollection Wisconsin performs uploads (\$75/hour)). For example, uploading costs for a collection of 250 photographs with existing metadata provided in an Excel spreadsheet would be approximately \$225 (3 hours to coordinate transfer of files, review metadata and perform minor remediations, ingest content and upload to server).
- The Work Group recommends that WPLC contribute **\$1,750** annually towards the cost of maintaining the shared platform (25% of \$7,000 total annual expenditures by Recollection Wisconsin for software licensing and support). Annual hosting fees currently charged to the eight public libraries with legacy content already available in the shared platform would then be waived (\$675 total).

Recommendation: Storage

Reliable long-term storage of digital master files is a real and growing challenge, one that only the largest institutions in the state, such as UW-Madison and the Wisconsin Historical Society, have begun to tackle. Storage does not only mean creating backups of digital files, but establishing an ongoing strategy for maintaining, monitoring, and migrating files, which requires an ongoing commitment of resources and expertise.

The Work Group recommends that additional research be undertaken to explore avenues for collaboratively addressing this issue. Because this is a pressing need for all types of libraries and cultural heritage institutions, the Work Group suggests the creation of a multitype Digital Preservation Task Force to explore potential statewide solutions.

Recommendation: Scanning

The Work Group has identified a number of possible avenues for coordinated approaches to scanning original materials, but makes no specific recommendations at this time. This topic could be revisited more fully after training, access, and storage models are established.

While many libraries prefer to handle the scanning of their original materials in-house, many formats (e.g. maps, fragile bound scrapbooks, audio and video cassettes) require specialized

equipment and expertise in order to create high-quality digital copies. Potential future directions could include:

- Educate libraries in collections assessment and identification of priority materials for digitization and preservation.
- Collaborate with Wisconsin Historical Records and Archives Board, archivists at Area Research Centers, and other partners to conduct a statewide survey or otherwise identify high-risk, high research value materials for digitization.
- Develop collaborative grant applications (e.g. LSTA or other sources) to outsource to a vendor the digitization of a related group of at-risk/challenging materials from multiple libraries.
- Provide libraries with training, guidelines and equipment recommendations to digitize simpler, more straightforward materials (e.g. photos, documents) in-house (see Training and Information Sharing category above).
- Explore feasibility of creating regional digitization centers at academic libraries, systems, or large public libraries, to provide training, consulting and use of equipment (a pilot initiative is currently underway at UW-Milwaukee). Materials could be transferred to regional centers through existing delivery networks, and/or a mobile lab could be developed.