

NDSR Art, 2018-19 cohort curriculum assessment

December 12, 2019

Karl-Rainer Blumenthal, Chair, Curriculum Development Task Force

Summary

This assessment was prepared in order to evaluate the curricular aspects of the National Digital Stewardship Residency in Art Information (NDSR), the values of its changes between program years (see Appendix A), and to identify strengths and weaknesses for future application of the NDSR model of cohort-based introductory fieldwork. It finds that the curricula designed for the NDSR Art cohorts was generally aligned well with the goals and needs of this fieldwork, improved incrementally from its first to second iterations, and maintains areas that could be improved by future iterations or complementary programs, both in content and form.

Specifically, residents and host mentors affirmed the quality of the content of curriculum modules on *planning*, *project design*, and *stakeholder engagement* to their year-long program goals. Modules on *technology* and *project documentation* were less successful. And while the latter are appropriately unique strengths of hands-on fieldwork in the program to address, resident and host participants were also able to suggest novel ways in which they could be improved and included in future curricula. Chief in importance among these is the recommendation that future residency host and/or local community mentors be involved early in curriculum design and planning, in order to include more and earlier modules specific to the media and technology environments in their project work. This could likewise afford opportunity to address participants' consensus criticisms of the curriculum's form: that its Immersion Week could be so all-inclusive in content as to be overwhelming, and that its later modules throughout the program year could be so flattened or generalized for a broader audience that they miss opportunities to affect fieldwork directly.

Background

Curricula for the two NDSR Art cohorts were designed to follow the recommendations of the program's Curriculum Development Task Force--a panel of seven art information professionals, including three graduates of prior NDSR projects with special focus on art information--published in July 2017 (see Appendix B). These recommendations emphasized the importance of NDSR's active learning atmosphere and cohort model to the fieldwork of past participants, to which the NDSR Art program would add specific qualities in art information content and, as a program for the benefit of the Art Libraries Society of North America (ARLIS/NA) more broadly, aspects of outreach and ambassadorship in a burgeoning community of practice. It recommended education in three formats: preparatory "summer reading," an Immersion Week to establish a baseline of knowledge within the cohort necessary to begin fieldwork, and Continuing Education thereafter in the program year to address issues specific to that fieldwork as they arise and in a forum available to benefit the wider community. Specific readings, Immersion Week lesson and workshop modules, and initial Continuing Education models were described specifically, with the

expectation that residents and mentors would assume increasing responsibility to curate the latter.

The first cohort's curriculum was assessed in 2018 in order to identify areas for improvement in the second cohort's curriculum. Residents and hosts attended a focus group discussion at the 2018 ARLIS/NA annual meeting in New York City and responded to a survey to evaluate the relevance and quality of curriculum modules relative to the needs of projects' objectives and goals. A summary assessment with recommendations for improvements was delivered to the NDSR Art program team at the Philadelphia Museum of Art in April 2018. Recommendations included the removal, replacement, or expansion of specific Immersion Week and Continuing Education modules and the diversification of professional/organization types included in leading them. All recommendations were incorporated into the ultimate curriculum for the second cohort.

Methodology

This assessment is informed by two types of survey instrument and by direct feedback from 2018-19 NDSR Art cohort members:

- *Self assessments*: Surveys conducted in July 2018 to benchmark residents' and hosts' knowledge, experience, and competencies, and again in July 2019 to measure their progress throughout the program year.
- *Mid-Year survey*: Conducted in February 2019 in order to glean impressions of the relevance and effectiveness of Immersion Week and early Continuing Education modules towards fieldwork, and to identify any issues with Continuing Education formats or volume that require intervention from the program team.
- *Focus group discussions*: Conducted separately among residents and hosts by conference call in June 2019 in order to discuss the curriculum comprehensively, elicit feedback on strengths, weaknesses, areas for improvement, and recommendations for future program administrators.

Evaluation

Feedback received among the above can be summarized under the following themes:

Immersion Week is helpful, but can be overwhelming

Residents and hosts appreciated the content of most Immersion Week modules largely as relevant and helpful towards the primary themes of the program year, as prioritized between the Curriculum Development Task Force's and 2017-18 cohorts' recommendations. Modules on project management, mentorship, and stakeholder engagement in particular rated highly in value and importance to completing project work when participants were asked to evaluate each on a traditional Likert scale:

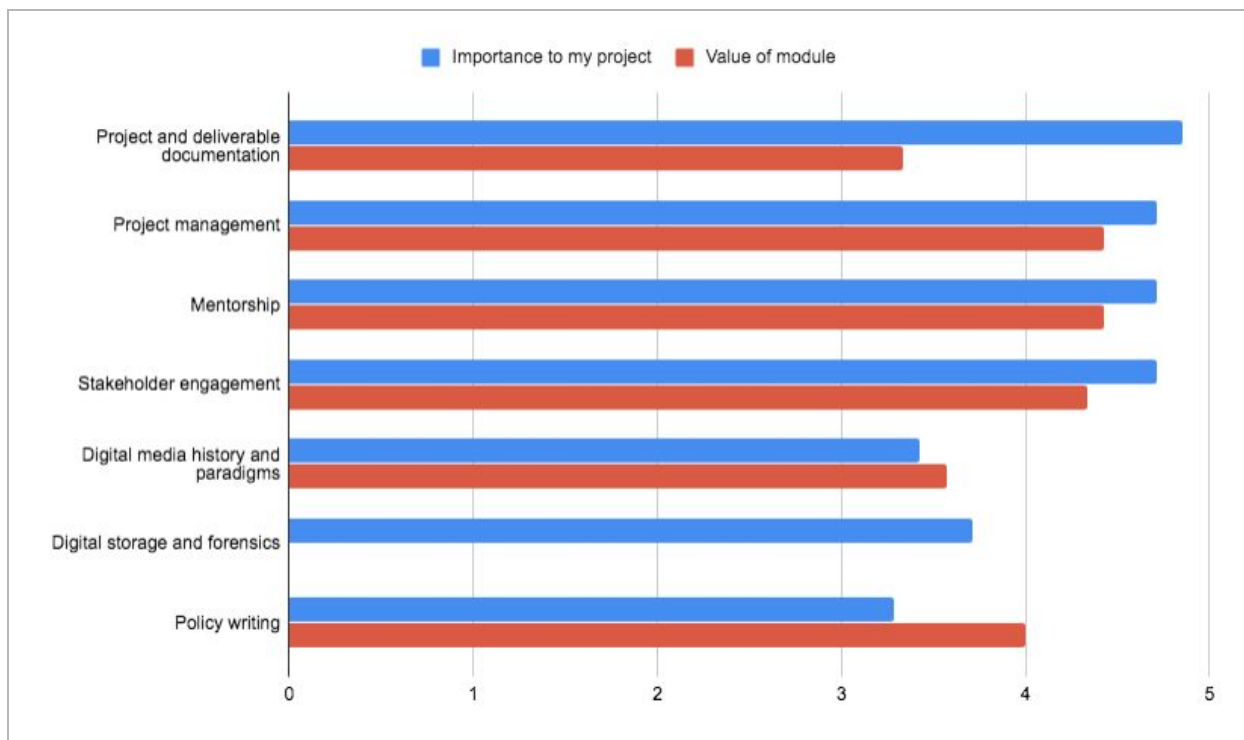


Fig. 1. NDSR Art 2018-19 cohort’s ratings of knowledge areas’ importance to their projects and their value as Immersion Week modules, on a scale of 1 (not important/valuable) to 5 (very important/valuable).

These particular modules were appreciated especially for the opportunities that they provided hosts and mentors to communicate about project goals, expectations, timelines, and institutional contexts. Residents reported that this helped them to establish a collaborative project management routine with mentors. Mentors recommended more time and resources devoted to these modules so that they might produce even more complete plans coming out of Immersion Week.

Residents and hosts agreed that there were however too many modules and related activities during Immersion Week in July 2018 (see Appendix C) to consistently retain information, and generally to not become overwhelmed sometimes with the volume of material. All agreed that fewer, if more intensive, modules on topics like the above would be preferable. The module on digital media history and paradigms was consistently singled out as unnecessary, perhaps more so than in prior years’ programs. (The module on digital storage and forensics involved unforeseen technical problems so limiting that the program team suggested it not be evaluated on its merits).

More help is needed with documentation

The significant exception above in terms of module importance and module value pertains to project documentation. This theme in Immersion Week was new to the 2018-19 cohort, upon the

recommendation of the 2017-18 cohort who were then engaged in significant documentation efforts in order to complete or transition their project charges. This is an area of work and a special professional skill central to the NDSR model for early career training--difficult to teach in a library school classroom but necessary to each project in its own way to be successful. It was however not incorporated intentionally into any one intensive module, rather spread across other modules on digital project management and forms of writing and representing information. Whether in Immersion Week or later in the program year, this topic deserves much more direct and thorough treatment.

Community stakeholders can help with scope

Topics of importance to digital stewardship projects in art information that do not necessarily need to be part of an early and intensive period of focus on project-specific management needs would still have a natural place in a year-long program of Continuing Education. The format of these remote events and their increasingly participant-led content both met with approval from residents and hosts. However, residents expressed a desire for these events to go into much greater detail than they usually did in order to affect their fieldwork. They attribute this to the need imposed upon Continuing Education modules to be open to ARLIS/NA membership generally, which would in turn generalize or otherwise reduce the complexity of the module's content. Hosts however expressed great satisfaction with local ARLIS/NA or other affinity groups' role mentoring residents, and suggested that they may likewise help in reducing the scope in turn as audiences for Continuing Education modules that are not generally open but still for the benefit of a wider community of practice. These too could be curated collaboratively with the residents and provide more regionally-based and in-person training opportunities.

At the other end of the spectrum, residents hoped that future host mentors and/or their local professional counterparts could help to fill the gaps left in training for technologies, standards, or workflows that are unique to their project among the four. Specifically, more early modules in the forms of video tutorials, specifications, or software documentation were recommended as alternatives to generalized summer reading and Immersion Week topics.

Residents and mentors have different needs and experiences

Aside from a particularly strong module on mentorship, neither NDSR cohort's curriculum made significant distinction between its participants as residents or host mentors; modules were designed to inform and educate them equally on topics relevant generally to both. Improvement in knowledge and professional competencies over the year were subsequently uneven between the two groups.

In general, both groups self-assessed increased confidence in most areas identified as important by the Curriculum Development Task Force at the program year's end:

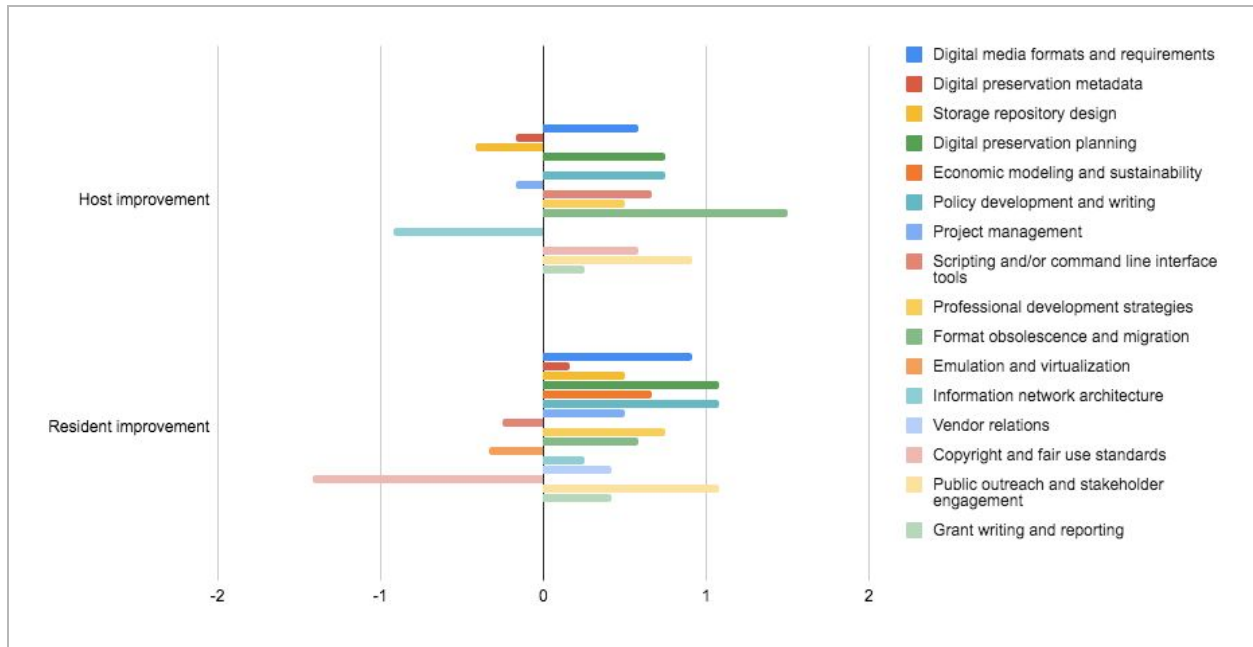


Fig. 2. Differences between NDSR Art 2018-19 resident's and hosts' July 2019 ratings of their confidence in knowledge and professional competency areas on a scale from 1 (not confident at all) to 5 (very confident) and their July 2018 pre-program ratings of the same.

Specifically, hosts reported no change or reduced confidence levels in more areas (7) than did residents (3). Moreover, one group could see improvement over time in an area where the other saw no change or decline. Most instructive among these is *Copyright and fair use standards*, which was removed from the 2018-19 curriculum intentionally upon the recommendation of the 2017-18 residents. This had an understandably negative effect upon 2018-19 residents that was not however reported by hosts.

Hosts especially expressed a desire for more curriculum modules to accommodate their different needs and roles as mentors and managers, and even for select modules to be conducted separately between resident and host groups. This, they suggested, could have the added benefit of contributing to cohort-building among mentors as well as residents during Immersion Week. There was consensus among host mentors that more specific material devoted to management in particular would benefit them equally where modules about specific technical topics may have uneven value among professionals in very different roles and/or stages of their careers.

Recommendations

Future early career and/or specialty-specific training programs could do well to begin with and make targeted improvements upon the curriculum model used by NDSR Art. It provides training in formats that complement graduate education and subsequent fieldwork, and in professional topics like project management and stakeholder engagement in particular. And while fieldwork

may necessarily remain the best forum for instruction in specific technologies and software, the inclusion of more local or affinity groups in these areas would support overarching goals of educating larger communities of practice through intensive focus on select cohorts. Tactically, future programs are encouraged to focus more on the professional conduct/context topics early and intensively in their curricula, while accounting for the different specific roles that mentors and residents will play in their home institutions. They should consult earlier with these host institutions and other local or affinity-related mentors to recommend early tutorial material of special importance to individual projects. Ultimately, they must not forget that project and deliverable documentation must be emphasized early and often throughout a program if all projects are to be completed successfully and art information stewarded to the next generation.

NDSR Art Summary curriculum assessment and recommendations for 2018-19 cohort

2 April 2018

Karl-Rainer Blumenthal, Chair, Curriculum Development Task Force

Introduction

This document summarizes recommendations for the 2018-19 NDSR Art cohort's Immersion Week and Continuing Education and Enrichment curriculum. These recommendations are based upon my interpretation of evaluations of 2017-18 curricular modules by the current cohort of residents and hosts.

To arrive at these recommendations, I conducted a short online survey of 2017-18 Immersion Week participants (n=5) in September 2017, led a discussion group of all current residents and hosts at the 2018 ARLIS/NA Annual Meeting in February 2018, followed that discussion with one further survey of residents and hosts (n=6) on curricular modules offered to date in March 2018, and reviewed the project descriptions provided by host institutions for the 2018-19 program year.

Recommendations

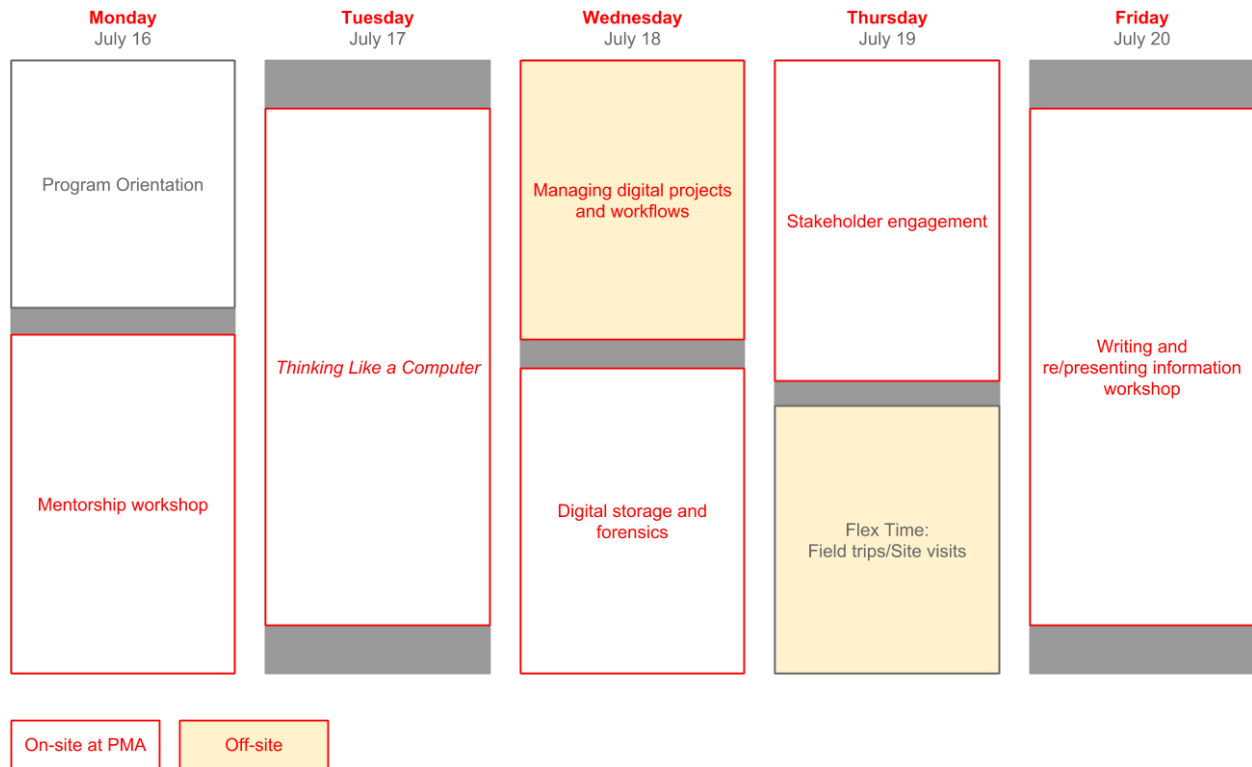
Immersion Week

- **Remove the *Copyright & Fair Use* module.** While an omnipresent concern to art librarians, copyright and fair use issues more obliquely affect projects to archive and preserve internal records, student work, and artist/studio files. 2017-18 cohort members appreciated the introduction to this topic that they received in their Immersion Week, but did not articulate any direct values to their project work and accordingly rated it lowest among their priorities when surveyed. Because multiple 2018-19 projects do however specify work to be performed on "access policies," that more general topic might instead provide for an enrichment session later in the program year.
- **Expand the *Mentorship Workshop* to better prepare mentors.** Cohort members universally valued and spoke highly of the mentorship workshop and of its early placement in the 2017-18 Immersion Week schedule. They also however critiqued its abbreviation and its bias towards training the mentees in the mentor-mentee relationship. An improved workshop would be longer, incorporating more of the original ARLIS/NA Mentoring Program Workshop manual, and include more material directed explicitly towards mentors. If workshop leaders deem it helpful to this end, this could at least partly be accomplished by beginning the workshop in separate groups of mentors and mentees.
- **Diversify presenter types.** The 2017-18 Immersion Week schedule featured modules led by librarians and archivists predominantly. The 2018-19 cohort would benefit from a schedule of invited guests that represent broader diversity in the professional titles, job descriptions, and relationships to the art or museum library present in digital stewardship projects. IT and curatorial department representatives were suggested for their frequent presence in project work. Consultancy groups in the field offer a particular value as well because they can speak to the term-definite and semi-independent contract relationships that residents likewise experience in digital stewardship projects. The 2018-19 Immersion Week could leverage this by inviting these kinds of module leaders and/or off-site hosts to engage in topics typical to their work, such as the modules on project management, writing, and stakeholder engagement.

- **Expand the *Project Management* module.** As with the mentorship module, the 2017-18 cohort expressed appreciation of the early inclusion but lamented the abbreviation of this topic. In particular, participants articulated a desire for the module to cover more than the single Agile model covered in the 2017-18 Immersion Week in order to prepare them for more diverse projects and settings, and to do so with more hands-on practice and tools. This presents an opportunity to invite a new perspective into the week as suggested above, as well. As a digital projects studio in the open source and civic technology realms, for instance, and a potential future local partner in digital stewardship, Azavea Inc. could be an ideal collaborator and host for such a module.
- **Enhance the *Policy Writing* module to cover more types and formats of writing and information representation.** 2017-18 cohort members extolled the importance of policy writing to their projects and their appreciated the way that the topic was addressed at their Immersion Week. They also however consistently qualified that this is only one among many forms of writing or otherwise summarizing their research findings that is necessary to successfully complete their projects. Similar guidance was suggested for writing professional survey reports, literature reviews, blog posts, process documentation, white papers, etc., in addition to other forms of information visualization that can succinctly summarize the residents' frequently vast and unwieldy research data. Given their similarly consistent charge to produce written products of various formats, for a wide variety of audiences, and from an independent perspective, a consultancy in the digital stewardship realm such as AVP or Artefactual Systems could provide the ideal leadership for such an expanded module. The 2018-19 cohort could furthermore leverage a workshop format in this case to conclude by producing a co-authored blog post for the program, describing their project plans or otherwise summarizing their charge for the coming year.
- **Educate participants more about preservation storage and forensic tools.** Multiple projects from the 2017-18 cohort and more from 2018-19 include the evaluation, implementation, and improvement of digital ingest and storage services. However, the existing cohort rightly flag this area as comparatively lacking in early education modules. The 2017-18 cohort expressed appreciation for later enrichment sessions held on this topic, but also some continuing ambiguity. It would be worthwhile to introduce this topic earlier and to leverage it as an opportunity to also engage the 2018-19 cohort in oft-requested hands-on, participatory practice with forensic analysis tools. As now a host mentor, Ben Fino-Radin might be uniquely positioned to lead this module, as he did a 2017-18 enrichment session. If he or the program generally prefer to not give this responsibility to a current mentor, there are NDSR alumni who now may likewise fill the role. Eddy Colloton (Denver Art Museum, NDSR-AAPB alumnus) would be a particularly ideal candidate for his direct experience with disk imaging, forensic analysis, and storage in a museum context. Other possibilities include Rebecca Fraimow (WGBH, NDSR Boston alumna) and Shira Peltzman (UCLA, NDSR New York alumna).
- **Include interviewing practices and tools in the *Stakeholder Engagement* module.** Multiple 2017-18 and more 2018-19 projects place high importance upon information gleaned by residents from surveys across and interviews within allied institutional departments or external stakeholder groups. This critical issue of professional communication was not addressed in the 2017-18 module on stakeholder engagement, though. To better prepare the second cohort, some time from this module could be redirected towards training them in best practices for preparing, conducting, recording, and reporting on stakeholder interviews. From their own NDSR experience

in this area, Coral Salomón or Vicky Steeves (NYU, NDSR New York alumna) could provide this missing element.

One application of the above recommendations could appear “at-a-glance” like this prospective Immersion Week schedule:



Continuing Education and Enrichment

- **Continue to support live and online enrichment at participants’ direction.** 2017-18 residents expressed occasional difficulty with defining the continuing education topics that would best serve their projects, however affirmed that their proposals were consistently feasible to organize and realize once they had done so. They furthermore affirmed that both in-person and virtual forms of enrichment produced so far were valuable. The 2018-19 cohort should enjoy the same privilege to increasingly curate their own curriculum as the program year progresses. To better engage with instructors and emulate the in-person experience when conducting these modules online however, the current cohort recommend that more video be employed in presentation when possible, rather than relying solely on visual aids like PowerPoint slides.
- **Include a module on A/V and preservation metadata.** In addition to the *Access* module and possibly a follow-up *Storage and Forensics* module, mentioned in the Immersion Week recommendations above, it would be worthwhile to organize an early continuing education module on the subject of A/V and preservation metadata schema and issues. Like many digital project descriptions, the 2018-19 cohort’s reiterate the importance of metadata standards and application workflows to the sustainability of their work in vague terms, belying a broad ambiguity between the art information and digital preservation fields about where their metadata needs and

resources overlap. An early introduction and case study from a prior NDSR effort, such as Peggy Greisinger (George Mason University, NDSR New York alumna) could provide, might empower residents and hosts to make long-needed progress in this area.



Education and Training Curriculum
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Table of contents:

Introduction	2
Curriculum	
<i>“Summer Reading”</i>	3
<i>Immersion Week</i>	4
<i>Continuing Education</i>	9
Capstone Report	10
Resources	11
Evaluation	11

Introduction

About this document

This document summarizes the recommendations for curricular aspects to the 2017-18 National Digital Stewardship Residency in Art Information (NDSR Art) cohort, as developed by the NDSR Art program's Curriculum Development Task Force:

- Karl-Rainer Blumenthal (chair), Internet Archive / NDSR-NY 2014-15
- Patricia Guardiola, Fisher Fine Arts Library, University of Pennsylvania
- Julia Kim, American Folklife Center, Library of Congress / NDSR-NY 2014-15
- Hannah Marie Marshall, Artstor
- Morgan McKeehan, Yale University / NDSR-NY 2015-16
- Karen O'Connell, Georgetown University Library
- Heather Slania, Decker Library, Maryland Institute College of Art

It also reflects the recommendations made by the NDSR Art Advisory Board upon that body's reviews of drafts delivered in July 2016 and February 2017.

It is intended for use by invited guest facilitators to refine their education modules during the program's "Immersion Week" (July 24-28, 2017) and by the full cohort of residents and host mentors to coordinate continuing education modules throughout the program year.

Goals and objectives

The curriculum's principal goal is to prepare the cohort and its stakeholders to successfully achieve their residency objectives, and furthermore to prepare them for the longer term responsibilities of careers in the stewardship of digital art and art information. The curriculum therefore reflects the following NDSR Art principles and objectives:

- **The cohort model.** The diversity of NDSR Art's residency projects, its host institutions, and residents, ensure that each individual stakeholder's education, training, and professional development enhances that of the other's. This curriculum provides a common foundation of understanding of the role of digital stewards in the art/information realm, upon which each participant is encouraged to share their unique perspective and provide mentorship and leadership for each other in areas of respective strength.
- **Community of practice.** As this residency is unique for its inclusion of a professional organization--ARLIS/NA--in the role of a key stakeholder, the curriculum is also made for the benefit of that broader membership, to speak to the concerns of all digital stewards in the art information realm.
- **Art/information.** The above stakeholders and projects represent a distinct constituency within the wider fields of librarianship, curatorship, and digital preservation, defined by their service to art and art information. The curriculum builds from a foundation laid by prior NDSR education and training initiatives by identifying opportunities to forefront the unique needs of this constituency.
- **Active learning.** NDSR programs excel at advancing digital stewardship education and training through practical, project-based learning. To prepare NDSR Art's participants to optimize lessons learned outside of the classroom environment, and to optimize its brief opportunity for immersive training of geographically distributed stakeholders direct and indirect alike, the curriculum

prioritizes education that gets stakeholders out of their seats and working hands-on with cohort members in practical problem-solving situations.

- **Outreach and ambassadorship.** Digital stewardship requires engagement with internal and/or external stakeholders. For this reason the curriculum emphasizes the “soft skills” that NDSR Art’s residents, hosts, and wider community of practice must cultivate in order to both successfully complete its residency projects and see that the products of those projects make sustainable impact on the art information sector, inclusive of public speaking and outreach, policy writing, project management, and long term planning.

In developing this curriculum, the Task Force reviewed the NDSR Art grant documentation and directives from its Advisory Board, curricula from select prior NDSR cohorts, core elements of the Library of Congress’s Digital Preservation Outreach and Education (DPOE) program, a survey of ARLIS/NA members, and added to all these its own unique insights as a body of professionals representing typical art information host institutions, leaders in digital preservation education and outreach, and NDSR alumni.

Curriculum

“Summer Reading”

NDSR Art will provide hosts and residents with the full schedule and details for the Immersion Week described in the following section, in order that all may familiarize themselves with the subjects to be engaged and read suggested reference material. NDSR Art will facilitate access to the reference material as required. NDSR Art grant administrators will furthermore furnish residents and mentors with the following three texts for their general preparation for the residency program year..

“What makes a digital steward: A competency profile based on the National Digital Stewardship Residencies” (Blumenthal, Griesinger, Kim, Peltzman, & Steeves, 2016): <https://osf.io/zndwq/>

- Research conducted by the NDSR-NY 2014-15 cohort into the skills, proficiencies, and knowledge most critical towards successfully completing National Digital Stewardship Residency projects, based on analyses of the project descriptions and surveys of the residents who perform(ed) them.

Re-Collection: Art, New Media, and Social Memory (Rinehart & Ippolito, 2014)

- As a survey of issues in the preservation of and access to born-digital artworks, an accessible and engaging guide through the many different challenges and opportunities that residents and hosts may face, from the challenges of format obsolescence to emerging opportunities for descriptive work.

The Information: A History, a Theory, a Flood (Gleick, 2011)

- A social and biographical history of information technologies, providing contextual reminders of the humanist goals, development histories, and problems inherent to the computational tools that NDSR Art program stakeholders will use, improve, and steward.

Immersion Week

At a glance

Day	Date	Activity	Location
Monday	July 24	Program Orientation	On-site at PMA
		1.1 Managing digital stewardship projects	
		1.2 Mentorship workshop	
Tuesday	July 25	2.1 <i>Thinking Like a Computer</i>	Off-site
		Flex Time	
Wednesday	July 26	3.1 Policy writing	Off-site
		Flex Time	
		3.2 Applying emerging standards in the field	
Thursday	July 27	4.1 Copyright & Fair Use	Off-site
		4.2 NDSR + Art	
Friday	July 28	5.1 Making the digital stewardship case	Off-site
		5.2 PMA Pitch session	
		Flex Time	

The Task Force outlines the following schedule to provide NDSR Art participants and stakeholders a common foundation in digital stewardship roles and responsibilities, to foreground the special concerns and ongoing work of stewards in the art information realm, and to foster the cohesion of the geographically distributed cohort.

Guests invited to lead these education modules are invited and encouraged to refine and improve them as they see fit and in coordination with the NDSR Art program manager and Curriculum Development Task Force Chair.

The Philadelphia Museum of Art (PMA) will provide space and appropriate resources to accommodate these modules on-site at the PMA or at proximal venues as necessary.

Modules

1.1 Managing digital stewardship projects

Topics: Agile project management; Scrum and Kanban processes for libraries

Objectives: Survey best project management practices in information organizations, with special attention to agile project management for digital media projects; articulate clear understandings of NDSR projects descriptions in terms of challenges, deliverables, stakeholders, and available resources

Formats: Instruction; short mentor-resident and group exercises

Facilitator: Sheila Rabun, Community and Communications Officer, International Image Interoperability Framework (IIIF) Consortium

Suggested reading: "UCLA Library Special Collections Digital Project Toolkit" (UCLA Library, 2015). <http://www.library.ucla.edu/special-collections/programs-projects/digital-projects-special-collections>

"The NDSA Levels of Preservation: An Explanation and Uses" (Phillips et al, 2013). http://nds.org/documents/NDSA_Levels_Archiving_2013.pdf

1.2 Mentorship workshop

Topics: Mentorship and menteeship; professional communication

Objectives: Learn good mentorship/menteeship characteristics and practices, with particular focus on collaboratively setting and pursuing professional goals

Formats: Instruction; short mentor-resident and group exercises

This workshop will largely follow the participant manual for the mentorship program established by the ARLIS/NA Professional Development Committee's Mentoring Subcommittee.

Facilitators: Heather Slania, Director, the Decker Library at the Maryland Institute College of Art

Shira Loev Eller, Art and Design Librarian, the George Washington University

- Suggested reading: “Facilitating Mentee-Driven Goal Setting” (Zachary, 2013).
 “Strategies and Checklists for Mentors: Mentoring Excellence Toolkit” #1 & #2 (Zachary & Fischler, 2012).
 “Begin With the End in Mind: The Goal-Driven Relationship” (Zachary, 2010).

2.1 *Thinking Like a Computer*

- Topics: History of digital media; information network architecture; format obsolescence
- Objectives: Fortify a common baseline understanding of and vocabulary for defining digital information and media characteristics that shape current and emerging paradigms for long-term stewardship; cultivate collaborative problem-solving between and among residents and hosts
- Formats: Instruction; video; games and group problem-solving activities
- This module is as an application of Jacob Nadal’s DPOE train-the-trainer module, “Access, Describe, Store: Thinking Like a Computer.”*
- Facilitators: Jacob Nadal, Executive Director, Research Collections and Preservation Consortium (ReCAP) / NDSR Art Advisory Board
- Suggested reading: *Digital preservation management: Implementing short-term solutions to long-term problems* (English tutorial). http://www.dpworkshop.org/dpm-eng/eng_index.html
 “Sustainability of Digital Formats: Planning for Library of Congress Collections” (NDIIP, 2013). <http://www.digitalpreservation.gov/formats/>
 “Sustaining Media Art” (Matters in Media Art, 2015) <http://mattersinmediaart.org/sustaining-your-collection.html>

3.1 *Policy writing*

- Topics: Digital preservation policy writing
- Objectives: Understand the roles of written policies, their effects on technical specifications and documentation in sustaining digital stewardship goals beyond the project phase; practice summarizing complex workflows and routines as they constitute larger preservation systems to be performed by professionals, initiated by donors/stakeholders, and supported by resource allocators
- Formats: Instruction; individual and small group exercises
- Facilitator: Emily Rafferty, Head Librarian and Archivist, the Baltimore Museum of Art
- Suggested reading: “Better together: A Holistic Approach to Creating a Digital Preservation Policy in an Art Museum” (Rafferty & Pad, 2017)
 “Born Digital: Guidance for Donors, Dealers, and Archival Repositories” (Redwine et al, 2013). <http://www.clir.org/pubs/reports/pub159/pub159.pdf>

“Born Digital @ Yale: Digital Accessioning Service”

<http://guides.library.yale.edu/c.php?g=300384&p=3593184>

3.2 Applying emerging standards in the field

Topics: Vendor relations; digitization and digital reformatting; digital storage media and architectures

Objectives: See digital stewardship standards and workflows applied in practice by a dynamic and collaborative team, with emphases on reformatting obsolete media and contemporary storage regimes; understand the place and practices of third-party vendors or external peer collaborators in permanent digital stewardship work

Format: Field trip

Host: George Blood, L.P.

Suggested reading: “Outsourcing and Vendor Relations” (Dale).

<https://www.nedcc.org/free-resources/preservation-leaflets/6.-reformatting/6.7-outsourcing-and-vendor-relations>

Memorandum of Understanding Workbook, Version 1.0 (Mizra et al, 2016).

<https://uta-ir.tdl.org/uta-ir/handle/10106/25651>

4.1 Copyright & Fair Use

Topics: Copyright, fair use, and open access standards and resources for museum libraries

Objectives: Understand the current constraints on acquiring and serving digital properties in exhibition, research, and educational environments, and fair use opportunities; identify and explore intellectual property rights issues specific to each NDSR Art project, possible risks and impacted stakeholders, and strategies for access

Formats: Instruction; small group exercises

Facilitator: Anne Young, Indianapolis Museum of Art

Suggested reading: “How User-Friendly are Museum Image Rights?” (Voon, 2016).

<http://www.hyperallergic.com/304000/how-user-friendly-are-museum-image-rights/>

“Code of Best Practices in Fair Use for the Visual Arts”

(CAA, 2015). <http://www.collegeart.org/pdf/fair-use/best-practices-fair-use-visual-arts.pdf>

“Images of Works of Art in Museum Collections: The Experience of Open Access” (Kelly, 2013). <http://www.clir.org/pubs/reports/pub157>

“Rights Statements” (Digital Public Library of America).

<http://rightsstatements.org/>

4.2 NDSR + Art

- Topics: Digital stewardship goals and project models adopted by previous NDSR residencies in art information contexts
- Objectives: Learn lessons from prior NDSR projects with special focus on art information issues and institutions; connect with peers in the NDSR community for ongoing professional collaboration and help throughout the program year
- Formats: Short panel presentations; question and answer; on- or off-site breakout time
- Participants: Sumitra Duncan, Head of Web Archiving Program, Frick Art Reference Library / NDSR-NY 2014-15 Host mentor
- Dragan Espenschied, Preservation Director, Rhizome / NDSR-NY 2015-16 Host mentor
- Peggy Griesinger, Metadata & Cataloging Librarian, George Mason University Libraries / NDSR-NY 2014-15 Resident, Museum of Modern Art
- Julia Kim, Digital Assets Specialist, American Folklife Center at the Library of Congress / NDSR-NY 2014-15 Resident, New York University Libraries

5.1 Making the digital stewardship case

- Topics: Public outreach and stakeholder engagement; public speaking
- Objectives: Survey tools, resources, and recommended practices for internal and external stakeholder engagement through policy documentation, outreach documents, and public events; introduce and exercise best practices in public speaking and written public engagement to prepare for module 5.2, "PMA Pitch Session"
- Formats: Instruction; group exercises; resident-mentor lunches
- Facilitators: Jaime Mears, National Digital Initiatives, Library of Congress / NDSR-DC 2015-16 Resident, DC Public Library
- Karl-Rainer Blumenthal, Web Archivist, Internet Archive / NDSR-NY 2014-15 Resident, New York Art Resources Consortium
- Suggested reading: "Digital Preservation Business Case Toolkit" (Digital Preservation Coalition, 2014).
http://wiki.dpconline.org/index.php?title=Digital_Preservation_Business_Case_Toolkit
- "Perspectives on Personal Digital Archiving" (Ashenfelder et al, 2013).
http://www.digitalpreservation.gov/documents/ebookpdf_march18.pdf
- "Community Stories and Institutional Stewardship: Digital Curation Dual Roles of Story Creation and Resource Preservation" (Kunda & Anderson-Wilk, 2011).

5.2 PMA Pitch session

- Objectives: Prepare residents and mentors for joint presentation of their respective projects to institutional decision makers and resource allocators; practice articulating the

scopes, values, and resources of projects tersely and to a general/uninitiated audience; receive and share constructive criticism for improvement in messaging and rhetorical style

Format: Mock “elevator pitch” presentations; question and answer

Participants: Kristen Regina, Arcadia Director of the Library and Archives, Philadelphia Museum of Art

Philadelphia Museum of Art preservation, curation, and interpretation leadership

Module 5.1 facilitator/s

Continuing Education

Education and training will continue virtually throughout the remainder of the program year to steward the cohort’s cohesion and curricular interdependence, and to provide the most accessible benefit to secondary stakeholders in their wider community of practice. Specifically, the Task Force, the residents, and their host mentors will coordinate, and ARLIS/NA members will be invited to join, 11 webinars scheduled roughly monthly throughout the year following Immersion Week.

Once completed, all webinars will be made accessible in the ARLIS/NA Learning Portal (pathlms.com/arlisna). Residents and their hosts will collaborate on blog posts that summarize the activities and lessons of these modules (at least module one per pairing) throughout the year on the program’s official website (ndsr-pma.arlisna.org).

To begin the Continuing Education program, the Task Force suggests the following two model modules of particular relevance to all NDSR Art residencies:

6.1 Designing, building, and maintaining the smart home for art/information

Topics: Repository design and management; time-based media; format migration and emulation

Objectives: Learn/review the critical information architecture and infrastructure requirements for storing born-digital art and art information; survey preservation actions important to born-digital art and art information, including emerging practices in emulation/virtualization.

Suggested reading: Rieger & Murray et al, “Preserving and emulating digital art objects” (1-20)
<http://hdl.handle.net/1813/41368>

Matters in Media Art, “Documenting Media Art”
<http://mattersinmediaart.org/assessing-time-based-media-art.html>

Rosenthal, David S.H. “Emulation & Virtualization as Preservation Strategies.”
<https://mellon.org/Rosenthal-Emulation-2015>

“Designing Storage Architectures for Digital Collections 2015”
<http://www.digitalpreservation.gov/meetings/storage15.html>

6.2 Grant writing and reporting

Objectives: Understand factors and considerations for funding past and potential future projects in digital art/information; learn best practices in scoping and articulating problems for project-bound resource allocation by key funders in the cultural heritage sector; learn core components for good grant-funded project deliverables vis-a-vis resource allocator/funder needs and expectations

Suggested reading: Foundation Center, "Proposal Writing Short Course"
<http://foundationcenter.org/getstarted/tutorials/shortcourse/summary.html>

Further virtual modules (7.1-4) will be coordinated in direct response to and support of residents' and hosts' project-based needs. Each residency will have the opportunity to propose topics and potential facilitators for education and training sessions like those that they engaged during Immersion Week, but which will immediately benefit them as their current work demands.

Four webinars (8.1-4) will be facilitated by NDSR Art projects hosts and residents--one virtual session per project--such that each project participant will have the opportunity for stakeholder engagement on behalf of their residency, to communicate its values and form relationships with interested and affected parties across ARLIS/NA.

Finally, all four residents will coordinate with the moderators of ARLIS/NA's section for students and new professionals, ArLiSNAP, to produce a single module (9.1) in the latter's "virtual conference" model that summarizes their residencies' key themes and outcomes, and the cumulative course forward that residencies chart for incoming professionals. This module is envisioned as an effective companion to and opportunity for direct feedback on residents' capstone report (see section below).

Capstone Report

To synthesize their year of learning for the benefit of secondary stakeholders inside and outside of the ARLIS/NA professional community, NDSR Art residents will complete their residencies by jointly authoring a "capstone" report that specifically enumerates the education and training that impacted their work, thereafter to be accessed via the ARLIS/NA Learning Portal.

This will by definition include, but not be limited to, the modules described above. This is envisioned as an opportunity for residents to reflect upon their work and to describe the education and training most vital to empower their new colleagues in the profession to perform the same. As their mid-career facilitators in these projects, the residents' host mentors will lead the design and definition of specific deliverables for this report. However, the Task Force specifically recommends that this report include at least one representative case study of an art information institution with an opportunity to engage a digital stewardship project, to include as much relevant advice from the year's education as the residents can provide toward that project's scoping, planning, outreach, and execution.

Resources

To facilitate the activities above concerning organizing educational modules and written/recorded deliverables, all residents and host mentors will be granted access to the following software services maintained by the NDSR Art program team and/or PMA:

- **GoToMeeting**, for internal meetings throughout the year and outreach/continuing education programs facing ARLIS/NA and broader public communities.
- **Basecamp**, for internal file sharing, task/project management, and reporting to NDSR Art program administrators.
- **Slack**, for group messaging related to education module coordination as well as other task and project sharing throughout the year.

Evaluation

The PMA will apply and they and the Task Force will analyze the findings of two evaluation instruments in order to facilitate the continuous improvement of this curriculum through the first and in preparation for the second NDSR Art program year.

NDSR Art residents and host mentors will complete self-assessments before Immersion Week commences in order to benchmark their existing competencies in or knowledge of the education module topics included. Upon commencing project work for their host institutions, they will furthermore provide short evaluations of all Immersion Week modules.

Both survey instruments will be designed to anonymize response data. Directly relevant Immersion Week review data may be shared with each module's guest facilitators/participants, however no further data will be made generally accessible beyond the PMA and Task Force without explicit permission of the survey participants.



Immersion Week Schedule

Sunday, 6:30-8pm

The cohort will meet for a meal at Pizzeria Stella located at 420 S. 2nd St, Philadelphia, PA 19147. If you are unable to make it, please email Karina and let us know.

Monday, July 16th

9:00 am Arrival at Perelman Building

Session 1.1 Program kick-off

Kristen Regina, Arcadia Director of the Library and Archives, Philadelphia Museum of Art / NDSR Art Program Director

Karina Wratschko, Digital Initiatives Librarian, Philadelphia Museum of Art / NDSR Art Program Manager

Session 1.2 Mentorship workshop

Heather Slania, Director, the Decker Library at the Maryland Institute College of Art

Shira Loev Eller, Art and Design Librarian, the George Washington University

Tuesday, July 17th

9:00 am Arrival at Perelman Building

Session 2.1 Think like a computer

Jacob Nadal, Director of Preservation, Library of Congress

Session 2.2 Digital POWRR / Project documentation and deliverables

Jaime Schumacher, Senior Director, Digital Collections & Scholarship, Northern Illinois University

Wednesday, July 18th

9:00 am Meet at Azavea, 990 Spring Garden, 5th Floor

Field Trip Azavea 9-12

Session 3.1 Managing digital projects & workflows

Deborah Boyer, Project Manager, Azavea

12:00 pm Leave for Main Museum Building

Meet in Main Museum Building, South Terrace Conference Room B

Session 3.2 Digital storage and forensics

Ben Fino-Radin, Founder, Small Data Industries

Tour Rachel Rose's *Wil-o-Wisp*

Erica Battle, The John Alchin and Hal Marryatt Associate Curator of Contemporary Art, Philadelphia Museum of Art

Thursday, July 19th

9:00 am Arrival at Perelman Building

Session 4.1 Stakeholder Engagement

Vicky Steeves, Librarian for Research Data Management and Reproducibility, NYU Libraries

Karl-Rainer Blumenthal, Web Archivist, Internet Archive / NDSR-NY 2014-15 Resident, New York Art Resources Consortium

3:00 pm Leave for George Blood

Field Trip George Blood LP

Friday, July 20th

9:00 am Arrival at Perelman Building

Session 5.1 Policy writing

Emily Rafferty, Head Librarian and Archivist, the Baltimore Museum of Art

Session 5.2 Writing and representing information

Seth Anderson Software Preservation Program Manager, Digital Preservation Services, Yale University Library

Session 5.3 Elevator pitch exercise

Session 5.4 Keynote Lecture: *Digital Preservation and Transformation*

Douglas Hegley, Chief Digital Officer, Minneapolis Institute of Art

Farewell Reception at Art After 5, Main Building, Great Stair Hall

Wednesday, 9am Azavea Field Trip

Tour and discussion around project management practices at a civic technology studio.

Thursday, 2pm George Blood, L.P. Field Trip

See digital stewardship standards and workflows applied in practice by a dynamic and collaborative team, with emphases on reformatting obsolete media and contemporary storage regimes. Reception to follow at the home of **Kristen Regina**.

Friday, 4pm Keynote Lecture

Meet local museum and library professionals and join Douglas Hegley for a lecture on digital preservation transformation and advocacy in the cultural heritage sector. Farewell reception to follow in the Museum's Great Stair Hall over Art After 5 Friday performances.



Recommended Reading

"What makes a digital steward: A competency profile based on the National Digital Stewardship Residencies" (Blumenthal, Griesinger, Kim, Peltzman, & Steeves, 2016): <https://osf.io/zndwq/>

- Research conducted by the NDSR-NY 2014-15 cohort into the skills, proficiencies, and knowledge most critical towards successfully completing National Digital Stewardship Residency projects, based on analyses of the project descriptions and surveys of the residents who perform(ed) them.

Re-Collection: Art, New Media, and Social Memory (Rinehart & Ippolito, 2014)

- As a survey of issues in the preservation of and access to born-digital artworks, an accessible and engaging guide through the many different challenges and opportunities that residents and hosts may face, from the challenges of format obsolescence to emerging opportunities for descriptive work.

The Information: A History, a Theory, a Flood (Gleick, 2011)

- A social and biographical history of information technologies, providing contextual reminders of the humanist goals, development histories, and problems inherent to the computational tools that NDSR Art program stakeholders will use, improve, and steward.

The following pieces are grouped according to each day's topic of discussion. Please glance over as many of them as time allows before coming to Immersion Week.

Monday

"UCLA Library Special Collections Digital Project Toolkit" (UCLA Library, 2015). <http://www.library.ucla.edu/special-collections/programs-projects/digital-projects-special-collections>

"The NDSA Levels of Preservation: An Explanation and Uses" (Phillips et al, 2013). http://ndsa.org/documents/NDSA_Levels_Archiving_2013.pdf

"Facilitating Mentee-Driven Goal Setting" (Zachary, 2013). "Strategies and Checklists for Mentors: Mentoring Excellence Toolkit" #1 & #2 (Zachary & Fischler, 2012).

"Begin With the End in Mind: The Goal-Driven Relationship" (Zachary, 2010).

Tuesday

Digital preservation management: Implementing short-term solutions to long-term problems (English tutorial). http://www.dpworkshop.org/dpm-eng/eng_index.html

"Sustainability of Digital Formats: Planning for Library of Congress Collections" (NDIIP, 2013). <http://www.digitalpreservation.gov/formats/>

"Sustaining Media Art" (Matters in Media Art, 2015) <http://mattersinmediaart.org/sustaining-your-collection.html>

Wednesday

"Tool Time, or a Discussion in Picking the Right Digital Preservation Tools for Your Program: An NDSR Project Update." (Caldwell, November 17, 2015). <https://blogs.loc.gov/thesignal/2015/11/tool-time-or-a-discussion-on-picking-the-right-digital-preservation-tools-for-your-program-an-ndsr-project-update/>

Memorandum of Understanding Workbook, Version 1.0 (Mizra et al, 2016). <https://uta-ir.tdl.org/uta-ir/handle/10106/25651>



"Preserving and Emulating Digital Art Objects" (Rieger and Murray et al, 2015). <http://hdl.handle.net/1813/41368>

Matters in Media Art, "Documenting Media Art" <http://mattersinmediaart.org/assessing-time-based-media-art.html>

Rosenthal, David S.H. "Emulation & Virtualization as Preservation Strategies." <https://mellon.org/Rosenthal-Emulation-2015>

"Designing Storage Architectures for Digital Collections 2015"
<http://www.digitalpreservation.gov/meetings/storage15.html>

Thursday

"Digital Preservation Business Case Toolkit" (Digital Preservation Coalition, 2014).
http://wiki.dpconline.org/index.php?title=Digital_Preservation_Business_Case_Toolkit

"Perspectives on Personal Digital Archiving" (Ashenfelder et al, 2013).
http://www.digitalpreservation.gov/documents/ebookpdf_march18.pdf

"Community Stories and Institutional Stewardship: Digital Curation Dual Roles of Story Creation and Resource Preservation" (Kunda & Anderson-Wilk, 2011).

"Outsourcing and Vendor Relations" (Dale). <https://www.nedcc.org/free-resources/preservation-leaflets/6.-reformatting/6.7-outsourcing-and-vendor-relations>

Friday

"Better together: A Holistic Approach to Creating a Digital Preservation Policy in an Art Museum" (Rafferty & Pad, 2017)
http://ndsr-pma.arlisna.org/wp-content/uploads/2017/07/Better-Together_Creating-a-Digital-Preservation-Policy-in-an-Art-Museum.pdf

"Born Digital: Guidance for Donors, Dealers, and Archival Repositories" (Redwine et al, 2013). <https://www.clir.org/wp-content/uploads/sites/6/pub159.pdf>

"Born Digital @ Yale: Digital Accessioning Service" <http://guides.library.yale.edu/c.php?g=300384&p=3593184>