1
00:00:09.910 --> 00:00:23.520
Sharon Burney: Hi everyone, and welcome to the third webinar for those who've been invited to submit final applications to *CLIR's Digitizing Hidden Special Collections and Archives: Amplifying Unheard Voices* program.

2
00:00:23.840 --> 00:00:35.679
Sharon Burney: I'm Sharon Burney and I'm a program officer on the CLIR Grants Team. And today's session will be focused on designing an achievable, sustainable digitization plan.

3
00:00:35.950 --> 00:00:51.140
Sharon Burney: And in order for us to continue to create great webinar experiences for our applicants and the application process, we've created a couple of polls that will help us continue to strive towards

4
00:00:51.641 --> 00:00:58.810
Sharon Burney: creating even better experiences. So first one we're going to do before we get started today.

5
00:00:59.360 --> 00:01:04.499
Sharon Burney: And then we'll do another one at the end. So I'm going to launch a poll and appreciate your input.

6
00:01:05.750 --> 00:01:06.839
Sharon Burney: There we go.

7
00:01:26.530 --> 00:01:27.310
Sharon Burney: Okay.

8
00:01:28.510 --> 00:01:33.730
Sharon Burney: Looks like everybody. Yep, okay, yeah, 100%. So thank you very much.

9
00:01:38.560 --> 00:01:46.300
Sharon Burney: We're going to start off with some introduction- first to this platform and then to our presenter for today's webinar.

10
00:01:49.600 --> 00:01:54.169
Sharon Burney: to start off. We want to share some notes about using zoom during this session.

11
00:01:54.220 --> 00:01:57.960
Sharon Burney: A live transcript is being generated if you'd like to utilize it.

12
00:01:58.070 --> 00:02:26.869
Sharon Burney: To turn on this feature, click the "CC Live Transcript" button at the bottom of your Zoom window. Attendees will be muted throughout the presentation. However, you're welcome to use chat for general introductions and conversation. If a chat box isn't already displaying on your Zoom screen, you can hover your mouse towards the bottom of the screen and open it manually. In order to send a message to everyone, remember to change the default from "all panelists" to "all panelists and attendees."

13
00:02:27.020 --> 00:02:39.220
Sharon Burney: We ask that you use the separate Q&A box to ask questions. This can be opened the same way as the chat box. Because we have limited time together, please feel free to follow along with the questions as they come in

14
00:02:39.340 --> 00:02:45.850
Sharon Burney: and upvote them, to let us know that it would be helpful to you to have them answered live.

15
00:02:46.170 --> 00:02:53.609
Sharon Burney: We'll do our best to answer all of the questions live, but we will also share responses to all questions alongside the recording.

16
00:02:53.670 --> 00:03:04.409
Sharon Burney: This session is being recorded. The slides, Q&A, recording, and transcript will be made available on the [Apply for an Award](#) page of our website within the next 2 weeks.

17
00:03:11.770 --> 00:03:22.309
Jane Larson (she/her): Before we move into our program content, we'd like to center today's conversation by acknowledging that as residents of the US, we are speaking to you from unceded land of many Indigenous peoples.

18
00:03:22.460 --> 00:03:30.980
Jane Larson (she/her): We recognize the longstanding history that has brought us to reside on this land, and we seek to have greater understanding of our place within that colonial history.

19
00:03:31.740 --> 00:03:38.130
Jane Larson (she/her): We denounce any acts of terrorism, colonialism, and environmental disregard, both past and present.

20
00:03:38.360 --> 00:03:45.939
Jane Larson (she/her): In particular, we'd like to respectfully acknowledge and recognize the original and current caretakers of the land, water, and air where we live,

21
00:03:46.190 --> 00:03:49.749
Jane Larson (she/her): all indigenous peoples and all their ancestors and descendants.

22
00:03:50.120 --> 00:04:01.390
Jane Larson (she/her): I'm grateful to have the opportunity to live and work on their homelands, and ask you to join me in acknowledging all indigenous communities, their elders, both past and present as well as future generations.

23
00:04:01.640 --> 00:04:10.630
Jane Larson (she/her): May this acknowledgement and our ongoing work demonstrate CLIR's commitment to beginning the process of working to dismantle the ongoing legacies of settler colonialism.

24
00:04:10.870 --> 00:04:18.029
Jane Larson (she/her): If you haven't done so already, we'd love for you to introduce yourself in the chat and share a land acknowledgement of the area where you live, if you would like.

25
00:04:22.550 --> 00:04:28.760
Jada Wright-Greene: During today's session our host will dig into designing an achievable, sustainable digitization plan.

26
00:04:28.770 --> 00:04:35.689

Jada Wright-Greene: We've allotted 90 min total for today, and the speaker will pause at the halfway point at 2:45 ET

27
00:04:35.900 --> 00:04:38.480
Jada Wright-Greene: for a quick break during their content.

28
00:04:38.610 --> 00:04:48.279
Jada Wright-Greene: We're hoping for an engaging time of conversation around: setting a realistic timeline (digitization, quality control, metadata/description, access).

29
00:04:48.460 --> 00:04:52.490
Jada Wright-Greene: Choosing equipment and systems for access and preservation.

30
00:04:52.710 --> 00:05:02.320
Jada Wright-Greene: Choosing appropriate digitization and description standards based on material type and condition, and in-house versus vendor.

31
00:05:02.700 --> 00:05:08.040
Jada Wright-Greene: The plan is to reserve about 25 min for Q&A near the end of this session.

32
00:05:08.290 --> 00:05:14.560
Jada Wright-Greene: Both the session co-hosts and CLIR staff will be available to answer questions at that time.

33
00:05:14.700 --> 00:05:19.189
Jada Wright-Greene: So while you may pose questions throughout using a Q&A box,

34
00:05:19.260 --> 00:05:23.800
Jada Wright-Greene: keep in mind that we may not get to every question as it's asked.

35
00:05:23.980 --> 00:05:30.300
Jada Wright-Greene: Staff will be keeping track, and we'll circle back to any unanswered questions during a dedicated Q&A.

36

00:05:34.240 --> 00:05:41.400
Jada Wright-Greene: In today's session, you'll learn more about the skills and strategies you need to complete the following application tasks:

37
00:05:41.510 --> 00:05:46.059
Jada Wright-Greene: the project details- outcomes (specific to digitization and description),

38
00:05:46.080 --> 00:05:50.670
Jada Wright-Greene: the project details-work plan, and the project details- capacity.

39
00:05:54.340 --> 00:06:01.111
Alyson Pope (she/her): Now we're glad to turn things over to Emily Galgano, Director of Archives and Collections at Sealaska Heritage Institute.

40
00:06:01.480 --> 00:06:10.649
Alyson Pope (she/her): We'll take just a moment to let Emily share her slides and get oriented, and as she does that, please remember that we'll be breaking for 5 min at roughly the halfway point.

41
00:06:17.950 --> 00:06:19.940
Emily Galgano: Alright. Hello, everybody!

42
00:06:20.780 --> 00:06:30.129
Emily Galgano: My name is Emily Galgano. I am the Archives and Collections Director at Sealaska, Heritage Institute, or SHI, located in Juneau, Alaska.

43
00:06:30.400 --> 00:06:38.500
Emily Galgano: We are a native nonprofit, founded in 1980 to perpetuate and enhance Tlingit, Haida, and Tsimshian cultures of Southeast Alaska.

44
00:06:39.200 --> 00:06:50.340
Emily Galgano: In my time here at SHI I have been the lead on several digitization projects, including a CLIR *Recordings at Risk* grant in 2020 and a CLIR *Hidden Collections* grant that will be finishing up this spring.

45

00:06:50.920 --> 00:07:03.480
Emily Galgano: The *Recordings at Risk* grant was to digitize a collection of reel to reels from a radio broadcast that used to run on our local radio station called Southeast Native Radio, that talked about contemporary indigenous issues of the 70s and 80s.

46
00:07:03.780 --> 00:07:12.670
Emily Galgano: The *Hidden Collections* grant is to digitize several 1,000 photographs taken by the Tlingit resident of Angoon and amateur photographer Cyril George,

47
00:07:12.720 --> 00:07:16.259
Emily Galgano: who took photos throughout his lifetime, documenting daily life.

48
00:07:17.060 --> 00:07:26.100
Emily Galgano: I've written several other grants and digitization projects ranging from as small as just a few cassettes to as large as 40 linear feet worth of videotapes.

49
00:07:26.650 --> 00:07:32.299
Emily Galgano: I also just recently received my digital archiving specialist certification from the Society of American Archivists.

50
00:07:34.580 --> 00:07:48.299
Emily Galgano: I'm here today to talk about designing an achievable and sustainable digitization plan. This is a really important part of preparation for any digitization project. So I'm really excited to be here to talk about my experiences with creating these plans.

51
00:07:48.920 --> 00:08:04.069
Emily Galgano: I will have time for questions both before our break and at the end of our session. But if you would like clarification on a specific point while I'm talking, feel free to put it in that Q&A. I will try to keep my eyes on it as we go, but if I miss something hopefully, the CLIR team can give me a little nudge.

52
00:08:07.750 --> 00:08:15.559
Emily Galgano: Really quick, I just have my session outline up here. We'll be covering 4 main topics, starting really broad and getting more specific as we go.

53
00:08:15.990 --> 00:08:22.530

Emily Galgano: First we'll go over what is a digitization plan. Then some things to consider before you start writing your plan

54
00:08:22.570 --> 00:08:31.229
Emily Galgano: and specific information that you'll need to have ready to go to input. And finally, a discussion of how to make that plan sustainable and achievable long term.

55
00:08:32.159 --> 00:08:52.509
Emily Galgano: And I will have some specific examples of things like format and metadata schema that I'll bring up, but I really wanna emphasize that there's no one size fits all answer to any of these big questions and big decisions. There are some things that will work well for us here at SHI that may not work best for you at your institutions.

56
00:08:56.060 --> 00:09:00.539
Emily Galgano: So what is a digitization plan? Just starting really broad here.
57
00:09:02.150 --> 00:09:05.679
Emily Galgano: A digitization plan, simply put, is a roadmap.

58
00:09:05.850 --> 00:09:12.230
Emily Galgano: This should be your in-depth guide, that when you are awarded funding you'll get the ball rolling right away.

59
00:09:12.380 --> 00:09:34.739
Emily Galgano: The way I like to think about it is, if I write a grant that I want this plan to be written, so that if I needed to take a leave of absence or transfer the project to a colleague, or if I left my position someone else would be able to look at this and jump in and figure out what has been done, what is left to do, and this means that you're gonna have to have a lot of details included, and have a way of tracking your progress throughout the project.

60
00:09:40.400 --> 00:09:57.959
Emily Galgano: I want to make sure we're all using the same vocabulary here. A digitization plan is different from a digital preservation policy. Digital preservation policy will guide your institution on all of your digital initiatives and a digitization plan will guide your project team on a specific digitization goal.

61
00:09:58.100 --> 00:10:13.109

Emily Galgano: That said, if your institution does have a digital preservation policy your plan should fit within the realms of that policy. For example, most policies will dictate specific file formats that are accepted as either accessions

62
00:10:13.110 --> 00:10:28.149
Emily Galgano: or born digital materials or for digitization projects. Your digitization plan shouldn't go rogue. And if you feel that file formats are incorrect or should be changed for your specific project, than maybe that policy should be reviewed and potentially be updated.

63
00:10:32.860 --> 00:10:41.190
Emily Galgano: A digitization plan is not so different from other types of project management plans that you may write, or any grant or project.

64
00:10:41.520 --> 00:10:51.199
Emily Galgano: In terms of what is required for the CLIR grant proposal, the digitization plan will include your outcomes, your work plan, your capacity, your subcontracts.

65
00:10:51.470 --> 00:10:58.589
Emily Galgano: and a big part of that is setting your realistic timelines, choosing the correct equipment and systems, access and preservation;

66
00:10:58.930 --> 00:11:08.590
Emily Galgano: choosing digitization and description standards, and deciding whether to do the digitization work in house or with a vendor. And we're going to be covering pretty much all of this today.

67
00:11:09.110 --> 00:11:22.470
Emily Galgano: So a little bit more details. Kind of your outcomes. The outcomes are the actual results of your projects. When it's time to submit your final reporting, what will you be bringing to the table to show the success of your project?

68
00:11:22.630 --> 00:11:34.810
Emily Galgano: And this is largely gonna be based on the goal of your project and with some projects that goal is just to digitize one specific set of tapes and others. It's gonna be a much larger project.

69

00:11:35.270 --> 00:11:39.269
Emily Galgano: I always like to think about these outcomes in terms of smart goals.

70
00:11:39.606 --> 00:11:53.330
Emily Galgano: Some examples up here. You wanna make sure all of your goals are specific, measurable, achievable, relevant, and time bound. For example, that means your specific goal is to digitize a collection of cassette tapes and write a finding aid for it.

71
00:11:53.670 --> 00:12:00.939
Emily Galgano: It's measurable because you can say that there are 400 cassette tapes in that collection, and one finding that you're going to write from it.

72
00:12:01.500 --> 00:12:23.229
Emily Galgano: It's achievable, and that the collection is not so large, it's not going to be impossible to get through all of those tapes, because you have the staff and the equipment to manage that project, and it's relevant because it relates to the specific mission of your institution and the resulting digital files are maybe frequently requested by researchers, and you don't have a way to give access to those yet.

73
00:12:23.390 --> 00:12:32.500
Emily Galgano: And it's time bound, because, you know, it's going to take 2 years, say, and you're putting in the commitment to make sure it's done within that 2 year period.

74
00:12:35.580 --> 00:13:02.889
Emily Galgano: Your outcomes are also going to be either tangible or intangible. Tangible outcomes are a little bit easier to quantify. That's going to be things like how many physical digital files you have made accessible, the actual number, as well as any finding aids or lesson plans, videos that are generated from this or articles that are written about the process. All those are tangible things that you could hand a copy of to in your final reporting.

75
00:13:03.100 --> 00:13:07.240
Emily Galgano: And they're pretty simple to quantify. You can measure those pretty easily.

76
00:13:08.580 --> 00:13:22.919
Emily Galgano: But you also have to think about the intangible outcomes in this case, one example would be community impact and that's a lot harder to quantify. So when you're thinking about your outcomes, how will you quantify an intangible outcome like community impact?

77
00:13:23.256 --> 00:13:45.709
Emily Galgano: That could be involving doing a survey with your audience with your patrons or tracking your research requests. If you're going to track research requests. You have to make sure there's time at the end of the project where the actual digital files are already out and in the public. And you've conducted outreach so that people know to even request them. So you can measure those reference requests.

78
00:13:47.067 --> 00:14:07.640
Emily Galgano: When we digitized a collection of tapes, we heard from some dance groups that had been featured in those tapes from the 80s that their existing dance groups now that had new members were actually watching that footage and relearning the dances that they had forgotten over time that hadn't been passed down to the new generation of dancers.

79
00:14:08.077 --> 00:14:28.060
Emily Galgano: That's really hard to measure. How do we measure that? In that particular case, we ended up collecting commentary from direct correspondence with the dance groups as well as comments in our related social media posts and compiling them. It's not quite a number, but it does give us some sense of how many people are impacted by this project.

80
00:14:31.860 --> 00:14:40.800
Emily Galgano: You also want to think about your work plan. This is going to be spelling out step by step what the project is and how it will be achieved.

81
00:14:40.870 --> 00:15:06.940
Emily Galgano: I will be talking a lot about all of these different things in more detail throughout the session today. But that's gonna include things like your schedule or your timeline, the activities that are going to be actually physically done by your staff, you or vendor, the people that are going to be involved at your institution, the partners and collaborators outside of your institution, the technology that you'll be using, risk mitigation,

82
00:15:06.980 --> 00:15:10.929
Emily Galgano: how you're going to assess the materials afterwards, or assess your project,

83
00:15:11.080 --> 00:15:13.469
Emily Galgano: and the sustainability of your project.

84
00:15:18.830 --> 00:15:23.369
Emily Galgano: Project details the capacity. Capacity can mean a few things,

85
00:15:23.500 --> 00:15:37.179
Emily Galgano: including who on your team will be involved in the project. But we're gonna talk about that more specifically in our next section. For now, I wanna also point out that capacity can mean more than just that the people that are involved in your project.

86
00:15:37.210 --> 00:15:43.800
Emily Galgano: You also want to be able to show that your project team has the ability to do the work outlined in your work plan.

87
00:15:44.290 --> 00:16:08.690
Emily Galgano: So think about what similar projects has your team conducted? And what areas of expertise you can draw upon? Are there past projects that have made collections accessible? What was success of that? And that doesn't necessarily just need digitization, but how have you made physical collections accessible. All of that's going to show that your team has experience with working with collections, making them available to the public. That's capacities.

88
00:16:09.400 --> 00:16:10.640
Emily Galgano: Additionally,

89
00:16:10.670 --> 00:16:15.549
Emily Galgano: you may want to show how your institution will grow its capacity because of this project.

90
00:16:15.850 --> 00:16:36.670
Emily Galgano: Maybe you've not done a digitization project of this scale before. So how will this project be designed in a way that builds capacity? For example, will this project include professional development for your full time staff? Will your storage capabilities be increasing, what policies are going to be created or updated or reviewed?

91
00:16:37.780 --> 00:16:42.669
Emily Galgano: Think about what knowledge will be gained by the project team and by the community at large.

92

00:16:46.490 --> 00:17:02.644

Emily Galgano: Subcontracts. This is going to be your external vendors. Think outside of your institution. For example, we're talking about digitization vendors, but also, if you're going to work with transcribers or translators or sound engineers or publishers.

93

00:17:03.080 --> 00:17:30.410

Emily Galgano: We have worked with all of these different organizations, text organizations before external transcribers who are able to hear especially things in native languages and being able to write those out. We've also had to work with sound engineers before, where we've had tapes of such poor sound quality that even when they're digitized, you can't get much audio from them. So, working with sound engineers who are able to try to edit that to make it more

94

00:17:30.410 --> 00:17:35.700

Emily Galgano: actually listenable. For example, those transcribers or translators.

95

00:17:37.490 --> 00:17:47.100

Emily Galgano: This can also relate to capacity, because even if you are a really small organization, you can still do big projects as long as you have a little bit of outside help.

96

00:17:47.592 --> 00:17:56.070

Emily Galgano: And so we're gonna talk more specifically about the decision to do the digitation, the digitization work in house or with a vendor in just a few minutes.

97

00:18:00.020 --> 00:18:07.229

Emily Galgano: Before we jump into the specifics, there are a few things to think about before you begin compiling your digitization plan.

98

00:18:07.770 --> 00:18:14.130

Emily Galgano: These are things that you should discuss with your project team in order to be fully prepared for the details you will need further on.

99

00:18:14.390 --> 00:18:19.810

Emily Galgano: Basically, I see these as things as good discussions to have prior to writing

100

00:18:19.870 --> 00:18:26.780

Emily Galgano: a digitization plan. Because if they change, you're going to end up having to rewrite a lot of your content. And you don't want to be rewriting.

101
00:18:31.100 --> 00:18:37.949
Emily Galgano: When you're getting ready to write your digitization plan, you first really need to consider what the collection is that's going to be digitized.

102
00:18:38.150 --> 00:18:56.720
Emily Galgano: There are a lot of things that will depend on the nature of the collection chosen. I know you'll be hearing more about this type of consideration and other webinars if you're doing the rest of these with CLIR, so I won't go into too much detail here. However, some things to think about are what is the importance of the chosen collection to the community that it represents.

103
00:18:56.860 --> 00:19:03.099
Emily Galgano: This can be important because you want to be sure that the digitized collection will be regularly accessed and used.

104
00:19:03.410 --> 00:19:15.209
Emily Galgano: A digitized collection that is never accessed, never used, is very easily forgotten about. And then it's not kept up when you need to transfer file formats or do checksums. You don't ever remember that collection.

105
00:19:16.620 --> 00:19:30.559
Emily Galgano: Does appropriate description exist? Or do you need to process further in my *Recordings at Risk* grant with the radio recordings, we already had item level descriptions of the reel to reels based on the descriptions, on individual real cases that were

106
00:19:30.610 --> 00:19:32.130
Emily Galgano: provided by the donor.

107
00:19:32.410 --> 00:19:47.610
Emily Galgano: This was really helpful in multiple ways. For one, the metadata could be easily added onto existing item records that we already had in our database and two, quality controls are infinitely easier. We were able to identify issues right away.

108

00:19:47.610 --> 00:20:04.948
Emily Galgano: There was one real that had supposedly an interview about Tlingit culture described, but when the digitizing company returned the files they had flagged that one for us to check, because the audio clearly didn't match the description we gave them. It was instead a children's program with a song about cats.

109
00:20:05.730 --> 00:20:12.810
Emily Galgano: So that one was obvious, but it really helped us when we were going through all the digital files to have descriptions to compare to.

110
00:20:13.610 --> 00:20:25.599
Emily Galgano: On the other side, in our current *Hidden Collections* grant, we are working with a photograph collection that had no real description at all, aside from the fact that it was generally organized in chronological order by decade.

111
00:20:26.090 --> 00:20:38.940
Emily Galgano: This can still be an achievable project, though, because a good chunk of our digitization plan also involved working with elders and community members to help identify the people, places, and events photographed in these images.

112
00:20:39.960 --> 00:20:52.289
Emily Galgano: That can impact your timeline. Our *Recordings at Risk* grant was a much shorter timeline than our *Hidden Collections* grant. So that's why it's important to note what sort of description you have. How much time do you actually need to allot to

113
00:20:52.360 --> 00:20:54.420
Emily Galgano: description in your project?

114
00:20:56.750 --> 00:21:18.379
Emily Galgano: Do you have the right to use and share these materials? Again, speaking from my own experience here, the *Recordings at Risk* grant consisted of radio recordings that had been publicly broadcast. The radio station had donated the materials with the intention of them being shared publicly, and when we applied for funding, we checked in with the station again to confirm that they were okay with us putting them online.

115
00:21:19.020 --> 00:21:34.839

Emily Galgano: With the photographs, we have the permission from the donation agreement with the photographer's family to share the materials, but since we did not have item-level descriptions of the images, there was always a chance that there could be photos of sacred or closed practice events.

116
00:21:35.280 --> 00:21:49.990
Emily Galgano: This was another reason why we chose to include the time with elders and community members to look at the images, to make sure, we had the opportunity to confirm that any images that are posted online or shared out are not going to cause harm to the intended audience.

117
00:21:50.510 --> 00:21:58.219
Emily Galgano: Understanding the rights and responsibilities you have for what you are digitizing can have a big impact on how you design your digitization plan.

118
00:21:59.920 --> 00:22:08.189
Emily Galgano: Lastly here, what formats are included in this collection? This is a huge consideration because it will impact how you decide to get the materials digitized.

119
00:22:08.640 --> 00:22:17.260
Emily Galgano: A collection that is entirely composed of cassette tapes may be easier to digitize in house, especially if you already have good equipment for digitizing cassettes.

120
00:22:17.670 --> 00:22:30.180
Emily Galgano: A collection that has 3 or 4 different formats, like DVCPRO, cassettes, and reels, would require multiple types of equipment and expertise to digitize. Let's talk about this a little bit more on our next slide.

121
00:22:31.870 --> 00:22:38.200
Emily Galgano: Because the next big picture question to consider is, will you do the digitization work in house or with a vendor?

122
00:22:38.560 --> 00:22:42.660
Emily Galgano: So here are some questions to help guide that decision that I have here.

123
00:22:42.840 --> 00:22:46.809

Emily Galgano: Do you have existing equipment and qualified staff to operate it?

124
00:22:47.460 --> 00:22:50.759
Emily Galgano: Is that equipment and software up to current standards?

125
00:22:51.750 --> 00:22:56.849
Emily Galgano: Will newly purchased equipment and software have a use beyond this project?

126
00:22:57.830 --> 00:23:06.339
Emily Galgano: Do you have existing policies for using the equipment, generating or embedding metadata, quality control, etc.? Other policies?

127
00:23:06.990 --> 00:23:12.629
Emily Galgano: Do you have any damage or durning materials? And or the staff expertise to handle those

128
00:23:12.640 --> 00:23:14.220
Emily Galgano: issues that may come up?

129
00:23:16.530 --> 00:23:28.120
Emily Galgano: Here at SHI, we've chosen to use an external vendor for all of our recent digitization projects. And I just want to go through a few of the reasons why we have chosen to do so, based on some of these questions that we asked ourselves.

130
00:23:29.050 --> 00:23:44.329
Emily Galgano: One, we have collections that were digitized in house by previous staff members from a decade or so ago, that while they were sufficient in some ways, they were not high enough quality given the low quality of the originals for transcription and translation works.

131
00:23:44.480 --> 00:24:03.229
Emily Galgano: This is that collection I mentioned earlier, where we had a sound engineer actually work on it. That's because the original digitization work wasn't good enough. And so we had to re-digitalize those tapes and get them done professionally, so a sound engineer could work with them to improve that sound quality.

132

00:24:03.330 --> 00:24:11.490
Emily Galgano: But we don't want to be always re-digitizing things. And that's one of the reasons we've chosen to mostly work with external vendors who have professional equipment.

133
00:24:12.630 --> 00:24:27.249
Emily Galgano: Equipment is another reason why we didn't, we haven't in recent years done in house. We would have needed to purchase a large variety of equipment for our collections. Just in our audio visual side of things, we have DVCPRO,

134
00:24:27.250 --> 00:24:54.570
Emily Galgano: betacam, betamax, VHS, reels, cassettes, and more. So while we have a lot of different types of materials in our vault, we also don't have an inexhaustible amount, so we saw that pretty quickly once we were done digitizing, say, the collection that had most of the betacam and betamax tapes, we weren't going to need that equipment for those specific tapes anymore.

135
00:24:54.898 --> 00:25:07.049
Emily Galgano: Our workspace is limited. We have a very limited small work room, and we didn't want to add in more and more types of equipment that had less than a 5 to 10 year lifespan, of use spam.

136
00:25:08.440 --> 00:25:33.339
Emily Galgano: And lastly, staff time. We are a very small department of a much larger institution. There's only 3 positions in the Archives and Collections department, and I'm the only one of those that focuses on the archive side of things rather than the objects. Realistically, I would not have been able to spend all day, scanning every day, scanning photographs, even if we did purchase a high speed overhead scanner to make the process go faster.

137
00:25:34.820 --> 00:25:45.010
Emily Galgano: All of this is not to say that you should always work with a vendor rather than doing work in house. Like I said in the beginning, some things that work for SHI may not work for your institution.

138
00:25:45.030 --> 00:25:58.009
Emily Galgano: In previous positions I've held, we've done the digitization work in house. An example would be when I was a student worker in a special collections, I took part in a long term project to digitize the alumni records.

139

00:25:58.160 --> 00:26:16.579
Emily Galgano: This project made sense to do in house because we had one of those high tech high speed overhead scanners. It was very easy to learn since I was there for the beginning of the project, my fellow student workers and I wrote a standard operating procedure for how to set up the scanner for that project and how to do every step of the process.

140
00:26:16.620 --> 00:26:22.479
Emily Galgano: Thanks to the student worker program at the school, there's always student workers who are assigned to that department

141
00:26:22.490 --> 00:26:37.409
Emily Galgano: and they required minimal training beyond that standard operating procedure. So there were always people who are able to do the work without all those competing tasks that come up with other duties as assigned from the regular full time staff that worked there.

142
00:26:38.325 --> 00:26:57.529
Emily Galgano: And because there were already people that were always able to do the work, and there was equipment that was able to do the work, there was then no need to coordinate shipping logistics for such a huge collection and the purchase scanner was something that would be used for plenty of other projects, both before, during, and after the alumni files project.

143
00:26:57.540 --> 00:27:12.999
Emily Galgano: So just overall, that project made way more sense to do in house than to ship out to a vendor. So it's really important to just assess all of the different aspects of your project and decide, are you gonna work with an external vendor? Or can you do the work in house?

144
00:27:17.140 --> 00:27:20.149
Emily Galgano: If you do decide to work with an external vendor,

145
00:27:20.220 --> 00:27:23.869
Emily Galgano: I have some things here to think about. To start off,

146
00:27:23.890 --> 00:27:27.959
Emily Galgano: has your institution worked with any digitization vendors before?

147
00:27:28.200 --> 00:27:34.410

Emily Galgano: And how was that experience? Do you have any neighboring institutions you can talk to? Who have they worked with?

148
00:27:34.500 --> 00:27:42.670
Emily Galgano: If the experiences were good with previous partners, it's good to check in with them first to get quotes? You can keep that relationship going.

149
00:27:43.400 --> 00:27:54.390
Emily Galgano: You may still want to get multiple quotes and talk to different vendors, and there may be some that offer different or better services. So it's always good to get multiple quotes even if you do intend to go with someone you've worked with before.

150
00:27:54.530 --> 00:28:08.780
Emily Galgano: But depending on your formats, you may actually have to go to another vendor, because not all vendors work with all media types, some specialize in audio, some specialize in photographs. It's all different equipment. So there may be different vendors that

151
00:28:08.990 --> 00:28:12.430
Emily Galgano: have different specialties that will work better for your collection.

152
00:28:13.680 --> 00:28:24.280
Emily Galgano: You also want to think about where is the vendor? I live up in Alaska. And so that's a big question, how are we going to get our materials to the chosen vendor?

153
00:28:24.760 --> 00:28:41.410
Emily Galgano: Even when we work with a partner located here in Alaska, I live in Juneau, which is only accessible by plane or boat. So if their vendor is located in Anchorage, I still have to coordinate shipping logistics to get on a plane. All those materials to Anchorage.

154
00:28:41.860 --> 00:28:47.050
Emily Galgano: Another vendor we work with is in Kentucky, which is an even bigger challenge to get materials to.

155
00:28:48.690 --> 00:28:54.720
Emily Galgano: When speaking with your vendors or your potential vendors, here's the list of questions you might want to ask them:

156
00:28:55.130 --> 00:28:58.590
Emily Galgano: Have they done projects of this size and scope before?

157
00:28:59.160 --> 00:29:01.690
Emily Galgano: Have they worked with this media type before?

158
00:29:02.110 --> 00:29:04.370
Emily Galgano: Have they worked with CLIR grants before?

159
00:29:04.990 --> 00:29:09.929
Emily Galgano: Do they have different specs than what you request? Things like format type or resolution type?

160
00:29:10.266 --> 00:29:17.170
Emily Galgano: If they do, why is that? Do you need to update your policies, or are they doing something that is something you don't agree with?

161
00:29:17.610 --> 00:29:20.769
Emily Galgano: How long would this project take to complete?

162
00:29:20.780 --> 00:29:23.840
Emily Galgano: And would they be able to start right away if you're awarded?

163
00:29:24.872 --> 00:29:38.169
Emily Galgano: These are all important things to ask because you wanna make sure that the vendor you're working with has worked with the type of materials you're providing, has worked with the specifications that you need, all of that.

164
00:29:39.500 --> 00:29:48.459
Emily Galgano: Choosing a vendor is a really important aspect of the project, so make sure you are diligent in following up with them and asking as many questions as you can think of.

165
00:29:48.610 --> 00:30:04.249

Emily Galgano: Once a vendor is chosen, you also want to make sure to keep them in the loop throughout your grant writing process. We found that many of the vendors we've worked with are willing to write letters of commitment with descriptions of their equipment and their processes, which could be a great addition to the proposal.

166
00:30:04.650 --> 00:30:20.030
Emily Galgano: You also want to keep them informed so you don't lose your place in the queue. You don't want them to be surprised because they haven't heard from you in months, but now you're ready for them to start, and they didn't even know you were awarded funding. So they took on other projects. So keeping them in the loop as well. Very important.

167
00:30:25.090 --> 00:30:28.240
Emily Galgano: Okay. The last big picture item here.

168
00:30:28.350 --> 00:30:31.190
Emily Galgano: Who will be involved on the project?

169
00:30:31.660 --> 00:30:42.329
Emily Galgano: This is good to consider before you get too far along in the process, because bringing the project team together sooner only makes sure your plan is as accurate as possible.

170
00:30:44.810 --> 00:30:46.940
Emily Galgano: Do you have the staff capacity?

171
00:30:47.460 --> 00:30:57.819
Emily Galgano: And this doesn't just mean that you have people who are interested in participating in the project, but do they actually physically have the time to do so.

172
00:30:58.220 --> 00:31:12.210
Emily Galgano: Like I mentioned earlier, we do not have the capacity to do much in-house digitization here, where I work, because, as the only archives focused position, I also do all of the accessioning, processing reference, department management.

173
00:31:12.610 --> 00:31:18.130
Emily Galgano: So there's not time for a large-scale in-house digitization project in a workload.

174
00:31:18.790 --> 00:31:23.219
Emily Galgano: I do have the capacity to manage projects and coordinate with external vendors.

175
00:31:23.290 --> 00:31:29.409
Emily Galgano: So understanding the staff capacity helps to dictate who can and who should be involved in a project.

176
00:31:30.960 --> 00:31:37.320
Emily Galgano: You should also think about what protocols you need to follow. I have an example here about media department staff.

177
00:31:37.776 --> 00:32:01.540
Emily Galgano: That's because here at SHI we have a media department that is in charge of all our media that includes online content, graphic design videos, videography photographs, everything. So when we have a project that involves posting videos to our Youtube channel or other social media. We have to include their staff time in our digitization plan.

178
00:32:02.800 --> 00:32:05.709
Emily Galgano: Are there staff in other departments who can assist?

179
00:32:05.900 --> 00:32:15.000
Emily Galgano: Is there, say, an Education Department that could assist with writing lesson plans or connecting you to schools for projects where you see students as the main audience?

180
00:32:16.800 --> 00:32:20.929
Emily Galgano: Will you have interns or temporary project staff involved?

181
00:32:21.050 --> 00:32:24.549
Emily Galgano: And how quickly are those positions filled at your institution?

182
00:32:24.720 --> 00:32:32.640
Emily Galgano: Here in Alaska, it can be a real challenge to hire temporary staff, especially if they would have to temporarily relocate up here.

183

00:32:33.506 --> 00:32:55.879
Emily Galgano: That's a big difference from when I lived in a big city in the lower 48, where there was a library school, and there were a lot of grad students who were always looking for temporary or intern work, and there's always more of those than there were positions to host them. So being aware of your institutions, needs, and abilities in that respect, that makes a difference, too, when you're planning.

184
00:33:01.920 --> 00:33:13.790
Emily Galgano: Alright, so now we've gone over some of those big picture considerations, things that you need to think about, as you're bringing your project team together and deciding on all of these plans.

185
00:33:14.530 --> 00:33:22.150
Emily Galgano: I want to talk about some specifics. This is stuff that you're gonna need to really think about and have hammered out while you're writing this digitization plan.

186
00:33:25.740 --> 00:33:33.249
Emily Galgano: We discussed equipment software broadly, but when you're ready to start writing a digitization plan, you'll need to have a lot more specifics.

187
00:33:33.610 --> 00:33:37.700
Emily Galgano: And there's really kind of 2 types of equipment and software you should be thinking about.

188
00:33:37.720 --> 00:33:42.379
Emily Galgano: How are you going to digitize the materials? And how will you share the final results?

189
00:33:42.960 --> 00:33:49.559
Emily Galgano: If you're digitizing in-house, how will you do that digitizing? What specific equipment do you need?

190
00:33:50.050 --> 00:33:53.500
Emily Galgano: Do you need to purchase it? Or do you have the equipment on hand?

191
00:33:53.850 --> 00:33:56.860

Emily Galgano: And how will you edit the resulting digital files?

192
00:33:56.910 --> 00:34:13.329
Emily Galgano: You may need to alter recordings to get better sound or add watermarks to photos or increase contrast if you're doing scanning of onion skin paper and you wanna make sure it's actually legible. Do you have the software and the expertise needed to do that editing post digitization?

193
00:34:15.179 --> 00:34:25.439
Emily Galgano: For sharing out the results, Do you have an online database with public facing access or will you use social media? Or is there some other way you're planning to share out these materials?

194
00:34:25.570 --> 00:34:28.740
Emily Galgano: Do you need to purchase software to accomplish this?

195
00:34:29.810 --> 00:34:35.070
Emily Galgano: We use Proficio by Rediscovery, as our collections database.

196
00:34:35.179 --> 00:34:47.089
Emily Galgano: It has a front end database for members of the public to access, and it's really easy to share photographs and audio files directly in the database so people can search the database find a finding aid

197
00:34:47.310 --> 00:34:50.449
Emily Galgano: and pull up the audio that's related to it.

198
00:34:50.902 --> 00:35:04.940
Emily Galgano: But video files are really large and they don't really work that well on the database. So generally it makes sense to upload those to Youtube and then we provide a link in the database in the finding aid that links to that Youtube page.

199
00:35:06.120 --> 00:35:15.689
Emily Galgano: We also store copies of all of our access copies on external hard drives that can be used by visitors in person as well as a backup if the Youtube page is down.

200
00:35:16.197 --> 00:35:29.730
Emily Galgano: So when you're writing your digitization plan, you need to have your outreach methods figured out so you know what technology may be required. Do you have existing databases that can do public facing access? Is that something you need to consider purchasing?

201
00:35:29.940 --> 00:35:42.070
Emily Galgano: Do you have a social media page that's really active that you can use to share things? Or are there other ways that you're going to share these materials out? Do you have hard drives, for in person, researchers who want to access these things?

202
00:35:42.630 --> 00:35:44.900
Emily Galgano: All of that, good questions to have.

203
00:35:46.300 --> 00:35:51.029
Emily Galgano: Also, if you have all any equipment already, do you have

204
00:35:51.060 --> 00:36:03.520
Emily Galgano: staff that are trained on how to use those items? Those equipment, that software? And do you have time or ability to train staff before the grant begins? Because that can be a really helpful thing to add in

205
00:36:03.870 --> 00:36:11.259
Emily Galgano: before you get even funding to already have practiced and tried out these things so you don't end up with any surprises on day one.

206
00:36:17.490 --> 00:36:26.090
Emily Galgano: After you've brainstormed about what equipment or software is needed, you can take stock of what you already have and what you need to purchase.

207
00:36:26.730 --> 00:36:37.469
Emily Galgano: If you already own the equipment and software, as I said, is the project staff trained on it already? Can you train them before the grant begins? Or do you need to include training in your timeline?

208

00:36:38.670 --> 00:36:43.970
Emily Galgano: If you're purchasing equipment or software, you should check multiple sources to get multiple quotes.

209
00:36:44.527 --> 00:36:49.880
Emily Galgano: If you have IT support at your institution, now is also the time to check in with them.

210
00:36:50.220 --> 00:36:54.039
Emily Galgano: Is this equipment or software something you will need their help with?

211
00:36:54.250 --> 00:37:02.760
Emily Galgano: At my institution, we're not able to download any software without an IT person virtually there to plug in the Admin passwords.

212
00:37:02.870 --> 00:37:09.300
Emily Galgano: And our administration also requires that all large tech purchases need to be approved by IT staff.

213
00:37:09.540 --> 00:37:23.908
Emily Galgano: So it may seem like a small thing to check in that the scanning software you want to purchase is okay, but it would really stink if that was the hold up once you started the project that you just picked the wrong software. And now they need to go through a bunch of different

214
00:37:24.530 --> 00:37:29.369
Emily Galgano: cost and benefit analyses of different software services because they didn't like the one you picked.

215
00:37:29.530 --> 00:37:30.470
Emily Galgano: So

216
00:37:30.830 --> 00:37:55.099
Emily Galgano: with that in mind, you wanna make sure they don't have any blocks against certain types of software, or that the equipment you are purchasing is compatible with any computer systems that you use, and you should be prepared to explain to your it or your

administration, or whoever approves these for purchases. You should be able to explain what the software or equipment is, and why you need that specific one.

217
00:37:55.260 --> 00:38:13.719
Emily Galgano: You may want to have analyses to share with them in advance so when we purchased our online database system with Proficio, we put together a document showing all of the upfront and ongoing costs for it, as well as the benefits of the one we had chosen, and compared it to other similar products out there.

218
00:38:15.946 --> 00:38:30.523
Emily Galgano: I also have a note here to check in with your networks. If you're considering purchasing equipment or software, it would also be a good idea to reach out to institutions in your community to see if anyone has experience with either of those things.

219
00:38:31.380 --> 00:38:58.340
Emily Galgano: And partly, that's for a couple of reasons, just to see if they have good experience versus bad experience, but it's also just good to talk to your neighboring institutions. Maybe they already have the equipment, and they can work out an MOU, or some other understanding or agreement, where you could use their equipment, or you had it, would they use it? That sort of thing. I also in the resources slide at the very end of this presentation I have a few listserv and forums listed.

220
00:38:58.635 --> 00:39:04.240
Emily Galgano: And they can be a good place to ask people's expertise and experience working with these things as well.

221
00:39:10.350 --> 00:39:19.489
Emily Galgano: So when deciding how you want to store your digital files, a lot of the same considerations apply as for other equipment and software.

222
00:39:20.290 --> 00:39:28.140
Emily Galgano: Talking to your IT can be helpful, especially if you're able to work out a way that they can help support the long term storage of your files.

223
00:39:28.460 --> 00:39:36.890
Emily Galgano: When discussing a recent upgrade option for our digital storage, our IT had a completely different idea how to do so than I did.

224
00:39:37.000 --> 00:39:44.650
Emily Galgano: And because of that open communication that we had, we went with a system called the QNAP system to replace our RAID storage devices.

225
00:39:45.965 --> 00:39:49.679
Emily Galgano: And that was a really helpful kind of open communication moment for us.

226
00:39:50.660 --> 00:40:06.139
Emily Galgano: I have a list here of some different types of storage. Most of the earlier digitization projects done here a decade or so ago, such as the in house set digitization I mentioned, stored their digital files on CDs and DVDs.

227
00:40:06.630 --> 00:40:19.919
Emily Galgano: And while these were good for providing access copies to researchers, you know, 10 years ago, most computers don't come with a CD drive anymore and we have to use external CD drives to access those items.

228
00:40:20.670 --> 00:40:27.120
Emily Galgano: Now that some of our new laptops don't even have USB ports, we need an adapter to use the external CD drive.

229
00:40:28.430 --> 00:40:51.370
Emily Galgano: They're also not good for long term storage of master or preservation copies. There can be other issues, too. Part of that *Recordings at Risk* grant, to digitize the southeast Native Radio recordings collection, I had to rip digital files from CDs. There had been a second part of the donation where they had already digitized the reels and put all of the

230
00:40:51.400 --> 00:41:00.660
Emily Galgano: digital files on CDs and donated just the CDs, not those original reels. We only had CD copies so that was the only version we could get

231
00:41:00.740 --> 00:41:07.009
Emily Galgano: of the audio, but they had been stored in plastic sleeves that had started to degrade.

232
00:41:07.499 --> 00:41:14.740
Emily Galgano: So part of the whole process was also carefully cleaning all that sticky residue off of the CDs before we could even

233
00:41:14.800 --> 00:41:15.830
Emily Galgano: rip them.

234
00:41:17.695 --> 00:41:21.830
Emily Galgano: So that's an issue that may come up with things like CDs and DVDs

235
00:41:22.920 --> 00:41:29.389
Emily Galgano: Thumb drives. They will have a lot of the same issues as Cds, including, as I mentioned, the soon to be defunct USB port.

236
00:41:31.185 --> 00:41:41.839
Emily Galgano: Hard drives are really good for access copies. It's how we store a lot of our access copies so we can easily bring them out for an in-person researcher, or send copies to remote researchers.

237
00:41:42.259 --> 00:41:54.930
Emily Galgano: The important thing is to make sure only access copies are stored on that hard drive. So if a researcher corrupts the files by not properly ejecting the hard drive, you're not putting your preservation or master copies at risk.

238
00:41:55.680 --> 00:42:10.099
Emily Galgano: Depending on the brand and the drive specs, you may need to replace these every 1 to 5 years. So check your specifications on your hard drives and make sure you're tracking when they were purchased, when they were put in use, and when they need to be updated.

239
00:42:11.510 --> 00:42:17.719
Emily Galgano: RAID storage devices are like hard drives, but there are multiple drives in one device that serve as backups.

240
00:42:18.015 --> 00:42:23.899

Emily Galgano: These are what we used for a long time, and they and we still use some of them that have life left in them.

241
00:42:24.238 --> 00:42:30.810
Emily Galgano: Because they have nice high storage capacity, and they have built in backups. It's a really good starting point for digital storage.

242
00:42:31.112 --> 00:42:34.330
Emily Galgano: They do still need to be replaced about every 5 years.

243
00:42:34.410 --> 00:42:43.060
Emily Galgano: So ultimately we have moved away from from those because we have so much storage required that it's no longer sustainable to keep replacing

244
00:42:43.090 --> 00:42:46.400
Emily Galgano: that many RAID storage devices every 5 years.

245
00:42:48.090 --> 00:43:08.729
Emily Galgano: An internal server. This is where you would definitely need to talk to your IT. Essentially, this is what we've worked out with our IT with this new system. They've had to upgrade our server room and put the archive storage on its own system, separate from the rest of the network that the institution is on so only I and IT have access to

246
00:43:08.740 --> 00:43:10.339
Emily Galgano: that storage

247
00:43:11.900 --> 00:43:21.170
Emily Galgano: For cloud storage, there are pros and cons. It is secure in the sense that you don't have to worry about a single drive or server going out of commission and losing everything.

248
00:43:21.557 --> 00:43:30.240
Emily Galgano: There are other considerations like maintaining the rights to your materials. As well as ongoing costs of what are essentially membership fees.

249

00:43:32.130 --> 00:43:44.320
Emily Galgano: There are other digital storage solutions out there, so the key will be finding a solution that fits your current institutional needs and funding capabilities, but also providing the best, most secure storage that you can.

250
00:43:45.200 --> 00:43:50.049
Emily Galgano: The thing to remember with digital storage is that there's no such thing as a permanent solution.

251
00:43:50.412 --> 00:43:56.729
Emily Galgano: You can't just set it and forget it. Even the new system we have installed will have to be updated within 8 to 10 years.

252
00:43:57.290 --> 00:44:27.159
Emily Galgano: And digital storage changes all the time. There are so many options out there, and the thing is, none of these options are bad per se. They each have their uses. I still use thumb drives all the time. When a researcher needs a high resolution copy of something for publication use. Sometimes it's just easier than trying to send a copy via dropbox. And you're always gonna have that older patron who doesn't understand how thumb drives work. And so, having some CDs that you're able to rip onto can be helpful in those situations as well.

253
00:44:33.460 --> 00:44:40.039
Emily Galgano: When you are deciding on your storage needs. Try to think about it in terms of needing 3 copies of every file.

254
00:44:40.510 --> 00:44:44.710
Emily Galgano: There's your master copy, a preservation copy and an access copy.

255
00:44:44.980 --> 00:44:56.660
Emily Galgano: The master copy will be the highest resolution that you can get. It should be stored separately from the others on your most secure and stable storage option, and it should basically be kept untouched.

256
00:44:57.640 --> 00:45:17.279
Emily Galgano: Your preservation files should still be the highest resolution that you can get, but they're the ones that you're gonna work with when you're embedding metadata or updating to a

new file format or doing check sums, creating access copies, and otherwise conducting any preservation actions on a file that should be on your preservation file, not your master file.

257
00:45:18.390 --> 00:45:28.650
Emily Galgano: This essentially makes sure that you always have a master copy as a backup. If something goes terribly wrong in in the preservation file, while you're making an access copy.

258
00:45:29.760 --> 00:45:38.749
Emily Galgano: In your access copies, they should be lower resolution. You can edit them, you can add watermarks, share them with researchers, and post them online, etc.

259
00:45:38.970 --> 00:45:55.749
Emily Galgano: I like to store them on things that are easy to access like on our general network drive or hard drives that are in my store to my office. Even if they're available on our online database, I do keep an access copy on the hard drive, as well as a backup.

260
00:46:01.880 --> 00:46:13.569
Emily Galgano: Alright. So this table I've put up here has the formats that we use here at SHI for our master preservation and access copies. This is also what we request from our digitization vendors.

261
00:46:13.660 --> 00:46:22.729
Emily Galgano: Though we usually just ask for one high resolution and one low resolution copy, and then we make our preservation copies from our master copies. Once they arrive

262
00:46:23.270 --> 00:46:32.860
Emily Galgano: for audio files, we ask for WAVand MP3 copies. For our visual or video files, we ask for AVI and MP4.

263
00:46:33.250 --> 00:46:38.690
Emily Galgano: Photos, we request TIFF and JPEGs. For documents, we ask for PDFs all the way through.

264
00:46:40.050 --> 00:47:04.880
Emily Galgano: As I've said, there is no one size fits all option here, so use these as a starting point or talk to your vendors and to your IT department, what are their suggestions? But you do

wanna make sure that whatever you decide you try to keep as much standardization as possible within your institution. Because you don't want it changing from project to project where you ask for one version of these types of files for access copies for

265
00:47:05.060 --> 00:47:13.389
Emily Galgano: this project. And then the next project, you're gonna completely change that. So try to think about something standardized, because that's gonna help make sure that everything is

266
00:47:13.570 --> 00:47:15.520
Emily Galgano: easy to work with down the road.

267
00:47:20.920 --> 00:47:27.580
Emily Galgano: The next detailed information you need to have ready when you're preparing your digitization plan is your metadata schema.

268
00:47:28.340 --> 00:47:39.050
Emily Galgano: On the top, there, I've listed just a few options and ideas. We use Dublin core mostly here so we are working on incorporating more PREMIS and TK labels, as well.

269
00:47:39.422 --> 00:47:50.730
Emily Galgano: There's so many different types of metadata schema you can use, but try to think about it also in the fact that you likely already generate some sort of metadata for your physical collections.

270
00:47:50.940 --> 00:47:58.999
Emily Galgano: Even if that's just descriptive metadata in the form of a finding aid, metadata for digital collections is really just taking it to that next step.

271
00:47:59.530 --> 00:48:14.440
Emily Galgano: When deciding on what metadata scheme to use, think about what metadata schema or description methods you already use and how are they incorporated into your collections already? How can you enhance those to add more information about your digital files?

272
00:48:14.880 --> 00:48:18.649

Emily Galgano: And how is that metadata incorporated into your collections management system?

273
00:48:19.410 --> 00:48:32.790
Emily Galgano: For us, since we use mostly Dublin core, we're able to incorporate directly into our database. Proficio does not use the exact same terminology as the Dublin core elements, but you can map it really easily from one to the other.

274
00:48:34.130 --> 00:49:01.544
Emily Galgano: When you're thinking about - what is digital metadata, digital preservation metadata, that's where PREMIS is going to come in. And that's going to be tracking things like the format, the original file format, any transitions that have been made over the years, as well as when it was digitized and who was it digitized by, what equipment was used, what software was used. All of that can be embedded into the files.

275
00:49:02.160 --> 00:49:23.450
Emily Galgano: And it can be a good way of tracking. So that's what I mean by the next step. There's descriptive metadata and then there's the next step, which is tracking what has been done to that file. The best practice would be to embed it, but you don't have to. If you have a way of associating that metadata with the file, and you want to put that into your descriptive metadata that's also, that works fine as well.

276
00:49:25.532 --> 00:49:44.900
Emily Galgano: Proficio has been really helpful for us with metadata creation because they were able to help us to design excel templates that match the fields in Proficio that we could then map to the Dublin core elements and by doing that we're able to mass import date metadata at the item level.

277
00:49:45.050 --> 00:49:47.980
Emily Galgano: And that's why I have this last bullet point here

278
00:49:48.329 --> 00:50:02.569
Emily Galgano: on the slide, is talking to your vendor, if you are working with one, because if you can give a vendor a template like that, and they can track all the information, because most vendors are gonna track some sort of information for you anyway,

279
00:50:02.852 --> 00:50:13.199

Emily Galgano: you can then receive that excel template, and import it directly into your database, or at least that's what we have been able to do, and it has made a lot of this process much much smoother.

280
00:50:16.310 --> 00:50:31.109
Emily Galgano: And as an example, I have put up here, a template example of one of our excel sheets. This is more of a descriptive side of things than the preservation side, but it was used in a summer intern project this past year.

281
00:50:31.720 --> 00:50:38.150
Emily Galgano: By using templates like this, we're able to spell out the exact information we want embedded in the item record

282
00:50:38.330 --> 00:50:42.669
Emily Galgano: on our online database and it allows us to do mass imports.

283
00:50:43.310 --> 00:50:51.059
Emily Galgano: Instead of manually updating each individual record on our database, we can use this template to import hundreds of records at a time.

284
00:50:51.430 --> 00:51:11.430
Emily Galgano: This particular example, as I said, is more descriptive, but the concept is the same. When we want to track our check sums or other preservation actions, we can add that as a column on our template, and we can update that record the same way, and it tracks it under different fields in our database.

285
00:51:12.470 --> 00:51:20.999
Emily Galgano: We can send blank templates like this to our vendors or to our team if the work is being done in-house, and they can easily fill it out as they're completing their work.

286
00:51:21.100 --> 00:51:39.439
Emily Galgano: For things with standardized lexicons like the category tab column on this, we have dropdowns that you can choose from. So it's, you know, pre-filled in. You just pick which one is the most relevant and then with the open text fields. like the summary note, you can allow for any text to be input.

287

00:51:43.040 --> 00:51:51.630
Emily Galgano: When we first switched to Proficio back in 2020, this feature was a game changer for us with our digitization and processing projects.

288
00:51:51.908 --> 00:52:02.240
Emily Galgano: If you have an online database, even just an internal one, and maybe doesn't have a public facing side, it's worth reaching out to their support team to see if they have the ability to do something similar to this.

289
00:52:06.190 --> 00:52:20.629
Emily Galgano: Okay, before I move on to this last section here about making a digitization plan sustainable. We're gonna be taking a short break, but first I wanted to pause and see if there were any questions, because we've talked about a lot of things already, and I see some

290
00:52:21.030 --> 00:52:22.899
Emily Galgano: question & answer things.

291
00:52:23.420 --> 00:52:32.960
Emily Galgano: So this first one is, if we choose to utilize digitization equipment from a neighboring peer institution, for example, another university library digitization lab,

292
00:52:32.970 --> 00:52:35.660
Emily Galgano: would we handle that much like we would say

293
00:52:35.880 --> 00:52:37.269
Emily Galgano: another vendor?

294
00:52:37.720 --> 00:52:43.220
Emily Galgano: What if there's no charge for the usage of equipment? Would we just include that information in the project narrative?

295
00:52:43.240 --> 00:52:49.190
Emily Galgano: We're exploring our options for procuring a large format scanner without purchasing one or shipping our materials to a vendor.

296

00:52:49.570 --> 00:52:51.798
Emily Galgano: Yeah, I think that would be

297
00:52:52.760 --> 00:53:07.209
Emily Galgano: a really good option. If you have a neighboring institution that has equipment already, I would just make sure that you have a formalized agreement or contract with them to make sure that

298
00:53:07.490 --> 00:53:09.180
Emily Galgano: you're not

299
00:53:11.790 --> 00:53:18.460
Emily Galgano: kind of screwed over down the road if they end up not having the time or the equipment breaks, and they don't have it and you don't have a backup option.

300
00:53:18.789 --> 00:53:26.049
Emily Galgano: So, make sure you have a formal contract written, and probably a letter of commitment that you can attach to your narrative, as well.

301
00:53:30.950 --> 00:53:37.996
Emily Galgano: I don't have necessarily a list of digitizing vendors. I can tell you some of the folks that we've worked with in the past.

302
00:53:38.510 --> 00:53:50.660
Emily Galgano: We have a company in Anchorage that we work with called Summit Day Media. So if you're on the West coast, maybe that would be an option and then on the east coast the Kentucky

303
00:53:51.090 --> 00:53:54.500
Emily Galgano: vendor that we work with, that is Scene Savers,

304
00:53:55.318 --> 00:54:15.210
Emily Galgano: and they have done other *Recordings at Risk* grants as well, so they're familiar with CLIR in their processes, which is why we've worked with them in the past, partially. But they also prioritize older formats, which has been really helpful. They are the ones that did our betacam and betamax tapes, which is a lot harder to find vendors who can do those.

305
00:54:15.518 --> 00:54:23.299
Emily Galgano: We've also found local vendors. Our radio station actually is able to do some of the newer formats. So if it's not a VHS or cassette tape,

306
00:54:23.693 --> 00:54:30.159
Emily Galgano: they have the ability to do that type of work. So that's in town, and it's less shipping.

307
00:54:33.949 --> 00:54:48.359
Emily Galgano: And then I think these next 2 might be more CLIR staff questions. We've got one they're considering contracting a project archivist to work on the project in house. Are there any requirements for contractors versus vendors?

308
00:54:51.400 --> 00:55:20.459
Sharon Burney: Yeah, this is gonna be contingent for your specific project needs and sometimes your organizational policies regarding hiring consultants. Some projects, it may make more sense to create a job ad and hire an archivist, and if you do do this, staffing is an allowable expense. You can include that in your project detail and your narrative. If this is a new hire for the project only,

309
00:55:20.826 --> 00:55:25.810
Sharon Burney: then you upload a job description or ad, make sure you include the hours.

310
00:55:26.280 --> 00:55:55.846
Sharon Burney: Please, an equitable salary based on where you live and fringe benefits to your budget information, the detail, and the narrative. For some organizations and projects, it might make more sense to hire this person as a consultant, and this would also be allowable, and included in your budget information, and on our Apply for an Award page, we have a guidelines for grant proposals involving subcontractors or contracts that you can find, and I think we'll drop that in the

311
00:55:56.250 --> 00:55:57.410
Sharon Burney: chat for you.

312
00:55:59.410 --> 00:56:00.110

Emily Galgano: Thanks.

313
00:56:00.390 --> 00:56:03.270
Emily Galgano: I think this next one is another.

314
00:56:03.360 --> 00:56:11.280
Emily Galgano: CLIR question. Are internal server upgrades for master or preservation copies an allowable digitization expenses for a CLIR grant.

315
00:56:17.590 --> 00:56:20.720
Alyson Pope (she/her): Sharon, you wanna take that one last, and then we'll take a break.

316
00:56:20.880 --> 00:56:40.030
Sharon Burney: Sure. Yeah, we can. That's a tricky question, and we'll go into more detail on this during our budget session. So there will be a session specifically on budgets. You can add some based on it, however,

317
00:56:40.170 --> 00:57:08.179
Sharon Burney: you have to be able to sustain that server upgrade after the project. You have to be able to show the reviewers that I can sustain, financially, this server upgrade after the project period. And that's what they're gonna be looking for and also like, is this, just for ingest purposes, you know, and these type of things. So I think that's a little trickier of a question. And if you have a specific

318
00:57:08.732 --> 00:57:29.389
Sharon Burney: upgrade that you want to utilize, I would email us so that we can look at it and make sure it's an allowable expense. And you can always email us at hiddencollections@clir.org with more details, and we'll be able to tell you. Yes, you can use this one, and this is the parameters within which you can use it.

319
00:57:29.580 --> 00:57:30.340
Sharon Burney: Sorry.

320
00:57:32.430 --> 00:57:38.719
Alyson Pope (she/her): Hey ya'll, we're gonna take a quick 5 min, and then we'll come back to Emily at 3:02

321
00:57:40.740 --> 00:57:41.890
Alyson Pope (she/her): Eastern.

322
00:58:12.530 --> 00:58:14.479
Alyson Pope (she/her): You can take it away, Emily.

323
00:58:14.850 --> 00:58:15.890
Emily Galgano: Alright.

324
00:58:16.330 --> 00:58:17.800
Emily Galgano: Welcome back everyone.

325
00:58:19.030 --> 00:58:28.009
Emily Galgano: So now let's talk about what makes our digitization plan actually sustainable or otherwise, just going beyond, but why don't you just scan everything?

326
00:58:30.290 --> 00:58:31.980
Emily Galgano: Alright. So

327
00:58:32.120 --> 00:58:42.660
Emily Galgano: sustainable to me means a few things, namely, that a plan is feasible, it is efficient, and at the end of the projects, the results or outcomes have long lasting effects.

328
00:58:43.060 --> 00:58:51.210
Emily Galgano: A plan that is not feasible or efficient will never be completed in the necessary timeline or funds will run out, or deliverables compromised.

329
00:58:51.440 --> 00:59:03.740
Emily Galgano: And a plan with no sense of the life aft of the deliverables after the project is destined to the same end as those CDs I mentioned earlier. Forgotten items that develop sticky residue that has to be dealt with down the road by someone else.

330
00:59:03.900 --> 00:59:11.519

Emily Galgano: The difference is that we could clean off those CDs and still access the content fully. Digital storage is not so forgiving when a hard drive fails.

331
00:59:13.350 --> 00:59:25.460
Emily Galgano: One way to ensure that your digitization plan is sustainable is to pack in all of the details. A digitization plan needs to have all of the information needed so the project can move forward with or without you.

332
00:59:25.810 --> 00:59:31.430
Emily Galgano: For example, if you're hiring temporary staff, they should be able to read the grant and know what their role and goals are.

333
00:59:31.540 --> 00:59:39.339
Emily Galgano: Of course they will still have to be trained in protocols for your institution or on certain equipment, but there shouldn't be confusion about what their day-to-day will look like.

334
00:59:39.470 --> 00:59:48.290
Emily Galgano: And they shouldn't need to go to you for description on things like file naming structure or metadata schema. All of those should be standardized and spelled out in your plan.

335
00:59:49.080 --> 00:59:53.950
Emily Galgano: Additionally, your vendors and partners need to be confirmed and informed of the plan and timeline.

336
00:59:57.380 --> 01:00:14.290
Emily Galgano: You also want to think about using the tools that you have, that includes more than just your physical tools. Of course, that's part of it. Think about the software and equipment and storage devices, your databases, your catalog systems, social media accounts, protocols, standards, etc, all things that you already have.

337
01:00:14.615 --> 01:00:29.750
Emily Galgano: That's not to say that you should never be seeking out new systems and new equipment, but more to say that what new things you seek out should fit into what you already know, and use. For example, you don't need to invent a new file naming convention for every new project.

338

01:00:29.810 --> 01:00:37.789
Emily Galgano: We use the same file naming system for our digital files as we do for our physical records, based off of our accession or collection numbers.

339
01:00:37.880 --> 01:00:53.320
Emily Galgano: This way, all of our digital files, follow the same naming conventions, and when inevitably our media department sends me a photo I sent them a year or so, and asks how to credit it again. I can look up the correct collection information just based off of the file name.

340
01:00:54.500 --> 01:01:18.220
Emily Galgano: And while there will be some things that are individual to each project, I encourage you to think about what aspects can be familiar. If everything is a completely new system and program and equipment, it's just that much more likely that the project will be short lived beyond the scope of the grant. If you get a storage device that requires a specific person on the IT team to grant you access, that may be a very secure system, but is it really that useful?

341
01:01:18.270 --> 01:01:22.920
Emily Galgano: Will you or your successor down the road really keep up with that maintenance?

342
01:01:23.030 --> 01:01:33.150
Emily Galgano: Instead of eventing new protocols, you may also think about following best practices like DAX and your chosen metadata schema. That will help with allowing for continued access and upkeep.

343
01:01:33.730 --> 01:01:42.310
Emily Galgano: I've mentioned our system Proficio a bit already, but working with them and getting training through their support team has been great growing our skills with our existing technology.

344
01:01:46.620 --> 01:01:54.340
Emily Galgano: Part of the reason for using tools and technology that you and your team are familiar with is because long term access starts with regular access.

345
01:01:54.460 --> 01:01:59.859
Emily Galgano: A phrase I've heard used a lot in the digital preservation field is: Used data is saved data.

346
01:02:00.490 --> 01:02:23.359
Emily Galgano: As I mentioned in the last slide, having your digital files stored on the locked down server that only it has access to may sound like a great and secure way to store your records, but digital files are not like physical files. You can rehouse paper documents in acid free folders and put them in an acid free box in a vault with perfect temperature and humidity conditions, and expect them to stay relatively unchanged for years to come.

347
01:02:23.640 --> 01:02:38.219
Emily Galgano: This is not the case with digital records where there are things like bit rot that will occur over time, or formats that are no longer supported on new computers. If you've ever tried to open a wordperfect document off of a floppy disk in the last few years, you know what I'm talking about.

348
01:02:38.250 --> 01:02:46.799
Emily Galgano: CDs and DVDs are not so far behind the floppy disk, and we have no reason to think that the formats we used for those will continue to be accessible in the future.

349
01:02:47.690 --> 01:02:57.710
Emily Galgano: The best way to combat this is to regularly access your materials. That is one of the reasons why choosing a collection with meaning to your patrons, and your audience is so important.

350
01:02:57.790 --> 01:03:07.430
Emily Galgano: If patrons are requesting access all the time, it is much easier to stay ahead of data loss. You can also perform check sums to make sure files are not degrading over time.

351
01:03:07.710 --> 01:03:23.390
Emily Galgano: Eventually, you may need to update the file type or format of the preservation and access files to something else that will be more readable by newer computers or software. With some things you may eventually want to emulate the original file, but that is a little bit rare.

352
01:03:23.410 --> 01:03:41.823
Emily Galgano: An example of emulation would be when video game companies release old games that can be played on new systems. It looks exactly like the original, but there are changes in the background that allow an old computer game to be played on a Playstation 5. That sort of thing. It looks the same, but fundamentally it's not the same file underneath.

353
01:03:42.440 --> 01:03:51.060
Emily Galgano: So that may be something you need to do in the future, if that's the sort of thing that you're digitizing. But that's not going to be something that you do to your master copy.

354
01:03:52.702 --> 01:03:57.050
Emily Galgano: Something else to consider with long term access is maintaining the originals.

355
01:03:57.446 --> 01:04:03.500
Emily Galgano: The preservation of originals should be included in your digitization plan. It's part of the fail safe.

356
01:04:03.620 --> 01:04:09.180
Emily Galgano: If the worst happens and electronic files are lost, having the originals as a backup is key.

357
01:04:09.360 --> 01:04:19.420
Emily Galgano: In a less devastating example, technology is always improving. There's always the potential that there will be improvements for materials that are particularly challenging to get quality digital files from.

358
01:04:19.590 --> 01:04:33.370
Emily Galgano: Such as the example I shared earlier with the in house digitized set tapes that we re-digitize professionally. Technology had also improved in the last 10 years since they were originally digitized that helped with getting better better quality sound

359
01:04:33.420 --> 01:04:34.879
Emily Galgano: the second time around.

360
01:04:37.110 --> 01:04:45.190
Emily Galgano: Thinking about the life of the digitized materials in your collection beyond the scope of this one grant project is key to a sustainable digitization plan.

361
01:04:45.380 --> 01:04:49.309
Emily Galgano: That includes being aware of the ongoing costs that will continue.

362
01:04:49.610 --> 01:04:55.840
Emily Galgano: If you have cloud storage or an online database, these will come with monthly or annual fees in perpetuity.

363
01:04:56.100 --> 01:05:00.220
Emily Galgano: Hard drives and servers need to be replaced regularly and the files transferred.

364
01:05:00.610 --> 01:05:04.509
Emily Galgano: Staff time is necessary to perform checksums and transfer files.

365
01:05:04.630 --> 01:05:12.329
Emily Galgano: In your digitization plan, how can you show that your institution is prepared for the long term access to these digitized collections?

366
01:05:17.480 --> 01:05:23.789
Emily Galgano: Since consistent access is a key component to long-term access, you also want to think about your outreach plan.

367
01:05:24.280 --> 01:05:37.530
Emily Galgano: Outreach is an important part of the work plan that may seem easy to just toss in a comment about how you will post about it in your institution's Facebook page. And that's that. But it really is a vital part of the long term sustainability of the project.

368
01:05:38.210 --> 01:05:44.450
Emily Galgano: Think about who your audience is and look at any data your institution has accumulated about reaching that audience.

369
01:05:44.640 --> 01:05:50.640
Emily Galgano: It will come as no surprise, I'm sure, to any of you that Facebook trends with an older audience than Instagram or Tiktok.

370
01:05:50.690 --> 01:05:56.910
Emily Galgano: So if you're hoping to encourage college students to use your collection, you may want to be sure to go beyond just Facebook.

371
01:05:57.240 --> 01:06:00.639
Emily Galgano: Like I said earlier, I do not have access to posting directly.

372
01:06:01.015 --> 01:06:09.489
Emily Galgano: Our media department handles all of that. So for me, my outreach plan has to include coordinating with our media department and including their staff time.

373
01:06:09.720 --> 01:06:21.060
Emily Galgano: That means I have to identify posting schedules, find funding for boosted posts, pick themes or holidays to feature particular digital collection over another. And more things like that.

374
01:06:22.250 --> 01:06:28.619
Emily Galgano: Social media posts and interactions can be a really powerful way to encourage access, but also think beyond that.

375
01:06:28.700 --> 01:06:39.660
Emily Galgano: In our current *Hidden Collections* grant, we are actually printing a photo book with a portion of the images digitized because the main community represented in the photos is Angoon,

376
01:06:39.780 --> 01:06:44.499
Emily Galgano: which is a tiny and remote village in southeast Alaska, only accessible by

377
01:06:44.610 --> 01:06:46.620
Emily Galgano: float plane or boat.

378
01:06:47.880 --> 01:06:55.049
Emily Galgano: Whilel, it does have internet access, that just isn't the best way to reach the people there. They're not really on Facebook as much.

379
01:06:55.411 --> 01:07:15.350
Emily Galgano: A copy of the book that we eventually produce will go to the community, Angoon. But copies are also going to go to the Alaska Public Library system, which, because

there's no public library in Angoon, it has a program that flies books out to remote communities by seaplane. So anyone can request a copy of the book from the library's catalog.

380
01:07:15.520 --> 01:07:24.579
Emily Galgano: So that's an outreach plan for a digital digitized collection that does not necessarily rely on digital access. So think about how

381
01:07:24.600 --> 01:07:32.700
Emily Galgano: creative ways that you may be able to reach your audience that go beyond just posting about it when you finish the project that it's available.

382
01:07:33.850 --> 01:07:39.889
Emily Galgano: Lastly, here, do whatever you can to make sure that the collection is both searchable and findable.

383
01:07:40.170 --> 01:08:02.089
Emily Galgano: That means having good, strong metadata and descriptive finding aids and all of that, but also is your audience familiar with using your database? When we released our Proficio database in 2020, the immediate reaction was confusion heightened by the fact that we had to immediately transition to remote reference only for a while. At the same time at the beginning of the pandemic.

384
01:08:03.060 --> 01:08:10.298
Emily Galgano: To help we produce videos that I was able to record at home explaining how to use the database with some tips and tricks.

385
01:08:10.650 --> 01:08:31.840
Emily Galgano: And I really wanna highlight findability here, because, as archivists sometimes we assume that if we put, you know, the right Library of Congress subject heading here on a finding aid, it fixes all the searching issues, and while they do help, it is just important to remember that the most findable collection is the one that your audience knows how to search for.

386
01:08:32.100 --> 01:08:48.690
Emily Galgano: So if you're getting comments for your patrons that something should be described a certain way, such as a specific name for a place, it's important to be open to

updating our records based on community input over time. Responding to that input is a really good way of building relationships with the community you want to

387
01:08:48.859 --> 01:08:49.990
Emily Galgano: be reaching.

388
01:08:55.000 --> 01:09:07.669
Emily Galgano: So next, let's talk about challenges and risk mitigation. There's always going to be challenges and changes that come up in a project. A sustainable plan does not pretend that those won't happen, but is prepared for when they do.

389
01:09:08.563 --> 01:09:18.480
Emily Galgano: There could be staff turnover. That's always a possibility. You have to be ready that anybody on your project could not be on your project by the time it's awarded, or halfway through the project.

390
01:09:18.904 --> 01:09:26.369
Emily Galgano: And so do you have someone else who can fill that position? Is there somebody, you know? How quickly are people hired?

391
01:09:26.399 --> 01:09:27.920
Emily Galgano: Do you have

392
01:09:27.960 --> 01:09:36.240
Emily Galgano: time built in that there can be breaks where there's maybe nobody able to work on the project, because there's no staff person in that position.

393
01:09:36.870 --> 01:09:38.860
Emily Galgano: Building in that time is important.

394
01:09:39.410 --> 01:09:40.959
Emily Galgano: Vendor availability.

395
01:09:41.559 --> 01:10:00.280

Emily Galgano: Just as an example, we had a problem with one of our digitization vendors where they said they would be able to do the work. They, you know, gave us their word. They were able to do it, and then, at the end of the day, they never had anybody hired in the position that could do the work that we needed them to do.

396
01:10:00.579 --> 01:10:08.979
Emily Galgano: And we ended up having to put off, put off, put off, and eventually we went with another vendor that we had to find kind of last minute so

397
01:10:09.080 --> 01:10:19.420
Emily Galgano: it could happen. We had all we did all the things you're supposed to do. We had an agreement with them, and they just didn't have anybody on staff in that position, and there was nothing we could do about it.

398
01:10:20.235 --> 01:10:36.349
Emily Galgano: So we had to find somebody else to take up that slack, and that changed the way our project timeline had to go, because all of a sudden we went from a much larger institution to a smaller and smaller vendor that's a one man show that was able to do the work, but took quite a bit longer to do so.

399
01:10:37.720 --> 01:11:06.900
Emily Galgano: You also want to think about broken, dirty, or damaged formats. We have a project. That's for a celebration project, which is a biannual event that happens every other year here at SHI. Started in 1982. That's where all those betacam and betamax tapes come from, and when the first ones from the 80s were digitized, our vendor found that they were absolutely filthy, and they couldn't get any content from them until they manually cleaned the tapes.

400
01:11:07.285 --> 01:11:20.310
Emily Galgano: That ended up taking a lot longer than we thought it would, because no one was expecting that issue. When we later had to digitize more betacam and betamax tapes we built in extra time in our timeline because we knew that that would be a possibility.

401
01:11:21.167 --> 01:11:41.709
Emily Galgano: Similarly damaged reel to reels are particularly prone to snapping their film and having breaks in the film. Making sure you're budgeting time and ability by your vendor to fix those issues. Are they able to splice them? Are they still able to digitize fragments? All that sort of thing.

402
01:11:43.377 --> 01:11:53.810
Emily Galgano: You also want to think about, you know, during our *Recordings at Risk* grant during the pandemic we were awarded pretty much right after everything shut down and

403
01:11:54.100 --> 01:12:03.479
Emily Galgano: the budget and timeline had to change drastically, because, as I mentioned, we have to ship everything out, and shipping from Juno to Kentucky

404
01:12:03.560 --> 01:12:11.509
Emily Galgano: suddenly became about twice as expensive than it had been prior when we actually budgeted out in our application.

405
01:12:11.830 --> 01:12:36.299
Emily Galgano: So these are things that could come up. I encourage you to think about challenges that have come up in other projects, whether or they are digitization projects or not. There are challenges that are gonna cross all boundaries of types of projects. Think about those things that have come up. Think about those issues. And how would you react to that. What can you do to prevent that from derailing your project to such an extent that you have to

406
01:12:36.720 --> 01:12:38.580
Emily Galgano: you know, get an extension.

407
01:12:42.240 --> 01:12:44.200
Emily Galgano: Now for timelines.

408
01:12:44.740 --> 01:12:49.860
Emily Galgano: I really want to emphasize here that this project that you're applying for

409
01:12:50.020 --> 01:13:01.409
Emily Galgano: it's very likely not your only task. When you are awarded this, it is much more likely that you will have to continue to attend to your regular duties and your other duties as assigned.

410
01:13:01.590 --> 01:13:14.409

Emily Galgano: So when you're making your timeline, don't just measure how long it takes you to scan one photo and scale that up to the number of photos in your collection and decide that you can do that for 3 hours every day for the next 6 months.

411
01:13:14.860 --> 01:13:29.429
Emily Galgano: That can be a good starting point, but it only really scratches the surface. So make sure you're budgeting in extra time around all of these things, because you're going to have other tasks that come up in your day to day. You're going to have to do other work.

412
01:13:30.239 --> 01:13:39.740
Emily Galgano: You also want to think about is the collection fully processed to the item level? Is that work you're going to be doing during the project? Make sure you're budgeting enough time for that.

413
01:13:40.830 --> 01:13:53.650
Emily Galgano: Do you have detailed metadata templates for the digitization company? Or what content? Are they going to be sending you debt back? What material are they sending you back? How? What information are you going to get from them that you can then turn into metadata?

414
01:13:54.650 --> 01:14:00.950
Emily Galgano: Make sure you're including the time it takes to purchase packing materials and conduct thorough condition reports.

415
01:14:01.400 --> 01:14:12.830
Emily Galgano: That is easy to overlook. A condition report may take you just a few minutes to do for one tape, but if you have 400, 500 tapes now, it becomes a lot bigger of an issue.

416
01:14:12.980 --> 01:14:25.020
Emily Galgano: And that includes conditions reports when they return from your vendor or even from your own in-house digitization lab if you have one. You should still be reviewing all of your tips to make sure nothing was damaged during the process.

417
01:14:26.354 --> 01:14:35.420
Emily Galgano: As well as including time for safely packing those materials and shipping them to the digitization company like I said, that took a lot longer once we shut down for the pandemic, and

418
01:14:35.440 --> 01:14:44.029
Emily Galgano: I was only in the office once a week, and I had to pack all those materials and send them to Kentucky. It took a lot longer, and then we budgeted. So make sure you're

419
01:14:44.150 --> 01:14:45.900
Emily Galgano: adding, in extra time

420
01:14:46.500 --> 01:14:51.869
Emily Galgano: you also want to add in extra time for your digitization company and have backup plans.

421
01:14:52.246 --> 01:15:10.849
Emily Galgano: You know they may tell you it's gonna take 3 months to do some work, but you should probably be budgeting at least double that, because that will include time for shipping that will include time if they end up having to bump your project lower on their priority list. Just there are things to consider in that that you should be thinking about

422
01:15:11.510 --> 01:15:29.809
Emily Galgano: You also wanna include time to review. You should be checking all of the returned physical items and the digital files, all of the metadata, any products you need to be reviewing all of that. What quality control are you doing? How are you gonna check that? Your radio recording of a very important interview is not really

423
01:15:30.030 --> 01:15:38.819
Emily Galgano: been, you know, recorded over and is now a children's program? You need to make sure you're taking time to review that before it goes live on your online database.

424
01:15:40.485 --> 01:15:49.629
Emily Galgano: And you also need to make sure you're including time to update your database to attach and update metadata to document your successes and the challenges of the project.

425
01:15:52.010 --> 01:16:06.790
Emily Galgano: You always wanna make sure you're budgeting more time than you need for all of these things. The first large grant that I ever wrote included hiring a project archivist to

process a large collection, and we scheduled a month to find someone and ended up taking a lot longer than that.

426
01:16:07.500 --> 01:16:08.840
Emily Galgano: Am I out of time?

427
01:16:10.640 --> 01:16:13.450
Jane Larson (she/her): Yeah, we'll need to move to Q&A real quick. So if there's.

428
01:16:13.725 --> 01:16:14.000
Emily Galgano: Right.

429
01:16:14.000 --> 01:16:16.300
Jane Larson (she/her): If you want to wrap up in a couple of minutes, then we'll move towards that.

430
01:16:16.300 --> 01:16:17.162
Emily Galgano: I'll be quick!

431
01:16:17.450 --> 01:16:18.620
Jane Larson (she/her):

432
01:16:19.263 --> 01:16:39.209
Emily Galgano: I just wanted to put up a chart schedule. I found these to be really helpful when I'm budgeting out my time. For a project to make sure that I'm tracking, that there's no other big events happening at the same time. We have a big event that happens every other year called Celebration, and from April to June we are pretty much

433
01:16:39.410 --> 01:16:45.339
Emily Galgano: booked, so I don't want to have anything in those time frames to be doing digitization work.

434
01:16:47.131 --> 01:17:04.919
Emily Galgano: And the last thing that I wanna say is to make sure that we are documenting everything. It's all well and good to have a nice timeline and written all out on paper, but once

the project actually begins that all goes out the window. You have to make sure if you're not keeping track, so have monthly meetings.

435
01:17:04.950 --> 01:17:31.289
Emily Galgano: Follow your schedule. If you have a project management system, use it and make sure you're creating documentation, not just for your Grant team, you know, or for your final reporting, but for yourself, so that when you go to future projects, you can see what works and what didn't. And you know who was a good project vendor. All of that stuff is really important to be tracking as you're going along, because you're not going to remember it 5 years down the road when you're applying for something else.

436
01:17:33.430 --> 01:17:34.530
Emily Galgano: Alright

437
01:17:35.060 --> 01:17:38.060
Emily Galgano: questions. Here's my resources slide as well.

438
01:17:41.270 --> 01:17:47.302
Jane Larson (she/her): Alright. Great! Thank you so much, Emily. I'll hand it over to our program officers who will field a few questions

439
01:17:47.660 --> 01:17:49.610
Jane Larson (she/her): and then we'll wrap up.

440
01:17:55.860 --> 01:18:01.979
Sharon Burney: Here's one. Is it an option to digitize half of our materials with a flatbed scanner?

441
01:18:02.020 --> 01:18:12.799
Sharon Burney: We would purchase (artworks mainly) and continue to use and outsource the remaining materials (soundpaper files, organizational and archival material).

442
01:18:17.401 --> 01:18:26.080
Emily Galgano: I would say, at least, from the perspective of doing projects, we've done that before. I'm not sure if CLIR allows that specifically. But

443
01:18:26.804 --> 01:18:32.909
Emily Galgano: if there are some vendors that only work with specific types of materials, and so you may have to work with multiple vendors.

444
01:18:35.820 --> 01:18:47.019
Alyson Pope (she/her): Emily, this is another question, I think, straight to you. How did you feel about your own capacity/expertise to do your project while applying to the grant? And did you find it was a learn as you go experience?

445
01:18:48.289 --> 01:19:07.189
Emily Galgano: Definitely some of my earliest grants that I wrote, that was maybe 5, 6 years ago, I don't think I quite understood what capacity meant. Exactly. So it's definitely been a learning experience. But now I feel like as I'm looking at projects I can see and I know what my day to day looks like.

446
01:19:07.190 --> 01:19:25.530
Emily Galgano: and what my areas of expertise are, I can kind of tell pretty easily when something's going to be outside the realm of what I personally am capable of handling and which is when I then need to start looking for a vendor or a temporary staff or part time staff to join on the team as well. Yeah.

447
01:19:27.280 --> 01:19:47.552
Alyson Pope (she/her): This is a quick one. I'm gonna take this is really a CLIR question, but what is the expected reporting schedule for CLIR? We do a report every 12 months, so if you have a 3 year project, you'll have to do 3 reports. You have one full project year, and then 2 months for reporting. So

448
01:19:48.220 --> 01:19:58.480
Alyson Pope (she/her): there's 2 months after your first year for your first report, 2 months after your second year for your second report, and for your final report you get an additional month, so it'll be 3 months after the close of your project.

449
01:20:00.780 --> 01:20:19.399
Sharon Burney: We do not have a deed of gift for the collection we are proposing to digitize only a newspaper article from the local paper stating that she donated her collection to us upon her death, which was in 1991. Is it a requirement that we have a signed a deed of gift? And if so, I will track down the next of kin and see if they will sign one.

450
01:20:21.990 --> 01:20:29.290
Sharon Burney: Which is going to be also a great plug for our rights, ethics and reuse session that will be coming up.

451
01:20:30.520 --> 01:20:34.760
Sharon Burney: Emily, did you want to give some advice before I give them the CLIR answer.

452
01:20:35.823 --> 01:20:40.076
Emily Galgano: I would say, if you can get a signed deed of gift, it's always better.

453
01:20:40.440 --> 01:20:47.930
Emily Galgano: That my rule of thumb. I hesitate sometimes with digitizing materials that we don't have very firm

454
01:20:48.010 --> 01:20:54.709
Emily Galgano: ownership of, because you don't want to go through all this work and then have somebody tell you to take it down.

455
01:20:56.880 --> 01:21:12.410
Sharon Burney: And make sure you clarify all of that. The reviewers will be looking to see that you do have a great understanding of your rights, that for the most part you own and hold them, and, secondly, that you do have a takedown policy in place in case something should arise, so that was great.

456
01:21:16.220 --> 01:21:41.939
Alyson Pope (she/her): Oh, we got one last one, working with the travel association, we've proposed sorting, arranging, digitizing, and describing textual materials. Many of these are original fieldnotes, logs, translations and transcriptions. We would like to include metadata/records updates that relate these textual materials to audio, video and images. Just want to make sure we can include this record linking and record updating as part of the digitization costs.

457
01:21:44.420 --> 01:21:54.700
Alyson Pope (she/her): Probably. This would be a matter of how you design your work plan, but if this is part of

458
01:21:54.850 --> 01:22:00.789
Alyson Pope (she/her): the processing of the digital materials, I think this could be an allowable cost.

459
01:22:01.400 --> 01:22:05.369
Alyson Pope (she/her): If it's built into the workflow. Would you agree with that, Sharon?

460
01:22:06.210 --> 01:22:13.610
Sharon Burney: Yes, as long as it's part of the preparation to, and it's not an extensive amount of your budget.

461
01:22:13.640 --> 01:22:15.259
Sharon Burney: Yes, it would be allowable.

462
01:22:15.990 --> 01:22:16.740
Alyson Pope (she/her): Yeah.

463
01:22:17.820 --> 01:22:20.519
Alyson Pope (she/her): So that's all the questions.

464
01:22:21.110 --> 01:22:24.610
Sharon Burney: So we have another poll. We have one more poll.

465
01:22:29.370 --> 01:22:35.720
Jane Larson (she/her): Yeah, we'll do another poll to gauge how you're feeling now, after this webinar about today's topic.

466
01:22:36.870 --> 01:22:38.999
Jane Larson (she/her): If you can take a moment

467
01:22:39.560 --> 01:22:41.390
Jane Larson (she/her): to fill that out now.

468
01:22:54.460 --> 01:22:58.390
Jane Larson (she/her): Alright. Oh, a few more coming in

469
01:22:59.730 --> 01:23:09.690
Jane Larson (she/her): Alright, I think we have a good result there. Thank you so much for your participation and feedback. As you work

470
01:23:10.230 --> 01:23:16.250
Jane Larson (she/her): on your final application, remember that there will be 3 additional sessions over the next month.

471
01:23:16.270 --> 01:23:26.749
Jane Larson (she/her): The next one will be on April 3rd, and we'll address those rights, ethics, and re-use questions you brought up. You can assign up for that on our Apply for an Award page.

472
01:23:29.150 --> 01:23:37.650
Jane Larson (she/her): and we wanna say we're so glad that you were able to join us today, and we want to extend a huge thanks to Emily for leading.

473
01:23:38.243 --> 01:23:53.940
Jane Larson (she/her): As we continue our assessment of the program, we appreciate your continued feedback. We'll share the link to the survey for today's webinar, and we look forward to hearing how the session went, what you might like to see in future sessions, and how we might improve.

474
01:23:54.535 --> 01:24:12.550
Jane Larson (she/her): Please don't hesitate to send questions to the CLIR Grants team as they come up between now and the final submission deadline of May 8th and as needed, our team can also consult with Emily if you have other specific questions on today's topic. We thank you so much, and we hope to see you at another session soon.