## MEETING MINUTES

# Digital POWRR

# Preserving digital Objects With Restricted Resources

### Date: Friday, October 12, 2012

### Time: 8:30am – 4:00pm

### Place of Meeting: Holmes Student Center – University Suite

### Attendees: Jaime, Sarah, Lynne, Drew, Katharine, Patrice, Meg, Aaisha, Matthew, Gayle, Martin, Amy, Jerome, Christopher, Martin, Steve, Liz, Amanda

* **Final Report**
  + Executive Summary
  + Statement of problem
    - Methods
    - Define/address audience
  + Literature review (Smaller institutions)
    - Types of tools available (link to list in appendix as well?)
  + Principles
  + Case studies (For each institution)
    - 1 - Institutional bios/characterization
      * How did we find stakeholders?
    - 1 - Self-assessment surveys (Liz – New)
    - 2 - Campus wide interviews (Data collection + Education)
      * Building awareness with faculty level
      * Small number of interviews to educating larger number??
        + Hopefully creating chain reaction by interviewed faculty to informally spread the word?
        + Also creating formal ways to educate, meetings, exhibits, speakers?
        + Awareness-building is a constant effort
      * Looking at awareness and buy-in in the library?
        + Using gut feelings, more qualitative a style than a pre- & post- tests via quantitative style
        + Various groups of people who are at different levels in the library
    - 2 - Higher Level awareness-building?
      * Building awareness with more administration level
      * How to measure success/failure?
      * Difficult with many other library programs happening at similar times
    - 3 - Policy/program creation ( Based in the spirit of principles/standards)
    - 3 - Technology testing/reports (ease of installation, $, functionality, ability to “get out”, ?)
  + Commonalities
    - How to get started? Next steps? Lesson learned? Advice to others? First steps? Which word choice should we use?
      * More than one section?
        + First steps for readers
        + Next steps for these institutions
    - Take a ways
    - Learning/lessons from the differences
    - What were winning arguments with administration??
      * What were non-winning arguments with administration??
  + Conclusion/Findings
    - Include recommendations/scenarios
  + Bonus Features
    - Executive 1 pager
    - IT 1 pager
    - Long version case studies
* Focus on types of material and not just size or institution type.
* How much information should we be putting in institutional bios/characterization?
  + May have to decide details later
  + Include what size we are, who are staff members are, collection size, student size etc
  + \*\*\*\*How long have we been working on this project???? ( long-term digital preservation) Where did the “oh crap” moment come in? When did you realize the digital preservation problem?? Is your administration saying “oh crap”?
  + How do we spread the “oh crap” to create change?
* Don’t focus on grant timeline, focus on a timeline that allows us to create the best white paper possible
  + Institutions develop their programs/policies
  + Where each institution gets to will be valuable
  + Piloting campus-wide education and tools
  + Next steps from this white paper become an implementation grant?
* In case studies discuss, how do we find change agents? How do we bring them into the process? In the library? Out of the library? Stakeholder analysis/scan?
  + Decide at some point, who are we going to talk to??
    - Including staff as well as faculty.
* **Policy/Program Creation**
  + Seeing how far we get in creating program and policies…?
  + Creating the plan and draft policies first, then go to administration
    - Something realistic that we are aiming for that aligns with the spirit of the principles
  + Realize that we will not get to a “final” stage
  + But do we want to build consensus first before submitting a policy? rather focus on a shared plan. More an action plan than a policy.
  + The plan is the groundwork that leads to the policy being created in the future.
  + Plan allowed for buy-in which led to power to write policy
  + These are not “one person” tasks
    - Copy-cataloging with local twists example, collaboration.
  + Next face-to-face and fill out these frameworks.
* **Technology Testing**
  + Do we have every institution set-up one option/tool to test?
  + Can each institution test multiple tools?
    - Storage? Preservation storage tools.
  + How much of end-to-end digital preservation is covered in this storage tool?
    - Do the tools involve ingest functions?
    - Is it just backup? Clarify that this is not “preservation”
      * Make sure this is CLEAR! Okay for now if this is all you can do.
  + Does this tool fit into our plans?
  + Push-back tool testing? Value in just using them, testing them? Examining versus testing? Evaluation versus testing?
  + What are we really looking at??
    - How well did it go onto your computer?
    - How long did it take to get help when you had a problem?
    - How easy was it to upload data to these services?
    - How much did they really cost? Monthly basis? Yearly?
    - Additional tools we needed to get?
    - Features?
  + Have to realize that one tool is not going to meet all of our needs.
    - We have to carefully define what types of tools we are testing
  + There is no one tool to throw at the problem; otherwise we’d all be doing it.
  + Pooling resources for expertise?
    - Is that what the audience will be able to do? Or looking to do?
  + Testing the situation from the original grant?
  + NIU / ISU run a front end while the other institutions are running storage or back-end?
  + Chris Rusbridge paper – “Excuse me some digital preservation fallacies”
  + We want to look at ingest and management tools because that is the difficult part?? Because storage is easier, pick what you can afford?? Is this the case?
  + We want to get the most bank for our buck
  + We cannot to cost-benefit analysis for everyone, just the example of how we did it on our campuses
  + Like the beginning of transportation, we don’t really know yet what the different vehicles do yet. They all get similar things done but they have different features.
  + So if you’re looking for these features…this product does this and costs this much…so on and so forth.
  + White paper should end up with a chart that has tools on one side, and what they get done on the other side and check marks to show what does what.
    - Feature comparison of products does need to be done, has not been done yet
    - We do not have to test each one of these to get some of this information.
    - Do we create the grid first to then help us decide what to actually test?
    - Consumer report style (full dots if they do it well, circles if they don’t)
      * We can see if the tools have the features, but may need more information for who well the features actually works
    - Can we talk to references who are using this product?
      * Appeal to public who uses software to discover truth
      * Do this via digital preservation/tool forums that already exist
* Tree size pro?
* DuraCloud too expensive for small? Internet archive as affordable option?
* Trying these tools really can be enjoyable. We have the opportunity to “try before we buy”
* Do you have more money or staff? Binary question.
* Advisor break downs and top 5 choices
  + Jerry
    - Distributed – meta archive, LOCKSS
    - One stop shopping/stand alone – rosetta, archivematica, hoppla, preservica
    - Third party – ~~oclc digital archive~~, portico
      * Amy says oclc digital archive as storage
    - Storage only – internet archive, chronopolis, carbonite, glacier, duracloud, oclc digital archive
    - Suggest\*\*
      * meta archive,
      * archive matica
      * portico
      * Hoppla
      * Duracloud – 2 storage provider config.\*\* specifically
  + Chris
    - Set up an instance of archive matica…but not one of the 5 tools
    - Tools that cover storage
      * Meta archive
      * Internet archive
      * Hoppla
      * Duracloud
      * Oclc digital archive
  + Martin
    - PLN – private LOCKSS network as distributed
    - List of 5
      * Duracloud
      * Archive matica
      * Chronopolis
      * Hoppla
      * Meta archive
  + Amy
    - Archive matica should be run….not a tool
    - Duracloud/chronopolis
    - Internet archive
    - Meta archive
    - Amazon tool – Amazon S3 with glacier
    - Tessella – now called Preservica
  + Liz
    - Internet archive
    - Duracloud
    - Meta archive
    - Oclc digital archive
* Afternoon Technology “Testing” Conversation
  + MetaArchive and DuraCloud on all lists
  + ArchiveMatica on 4 of the lists
    - Not storage
  + Take those 3 (MetaArchive, DuraCloud, & ArchiveMatica) as top
  + Do we need a more commercial option? OCLC digital archive?
    - Lots of layered fees, but what would it end up costing?
    - Price based on amount of storage…set up fees…lots of fees.
    - Plus to testing this…there are many small institutions with ContentDM
    - Even if it’s crappy it allows us to know what happens, and maybe calls for improvements (can be applied to all options)
  + Also appear a number of lists…Hoppla and Internet Archive.
    - Hoppla
      * Downloadable software
      * Set up target e-mail or SSH.
      * Targets the needs of home and office
      * Practical application? Capturing what is on a retiring faculty member’s computer.
      * Not a storage system
      * Good with small local historical societies? Maybe Jeff test as WIU
      * Like a scaled down version of ArchiveMatica
    - Internet Archive
      * Free is good
  + Portico
    - Currently have 48 digital collections
    - Testing? Maybe not, but keeping it in the data sheet
    - Not cheap
  + Do these tools have the feature of multiple copies?
  + Preservica/Tessella
    - Comes from smaller operations
    - High quality
    - Have an initial conversation
    - Ask to use for evaluative purposes for a year
    - More of a one stop shopping
    - Something like ArchiveMatica
    - Take DuraCloud and add emulation and migration = perservica
    - Get in contact with Minnesota IMLS grant that is currently using this
    - Strong focus of archival process
  + THE LIST…
    - MetaArchive
    - DuraCloud
    - ArchiveMatica \*not storage
    - InternetArchive
    - Hoppla \*not storage
    - Preservica – the whole suite, hosted cloud service
  + Don’t assume cloud = distributed
    - Make sure to purchase distributed option
  + Monitor the technology, company, and legal environment
    - Could do it alone, but that does cost a lot of money, staff, time etc.
    - If we do not have the ability to pull our data from the vendor, we do not have digital preservation!
    - \*\*\*\*Can we fire these people tomorrow?
    - We do not want this to turn into journal providers.
    - Does this mean we can consult a lawyer??? Contract lawyer. Dwayne Butler – sensitive to this issue. Peter Hurdle – also good. William Mar – from Illinois. Amy has a contract lawyer as well. Georgia Harper – works in digital field.
* Features
  + Can we fire these people tomorrow?
  + Continue this discussion online.
* Higher-awareness building? Suggestions.
  + ALA in Chicago – Annual
    - Gathering Troops
    - Meeting before the actual conference…take advantage of people being in the city/area.
    - June 27 - July 2, Summer 2013
  + Presentation by non-partner at CARLI annual meeting, ex Advisor
    - E-mail Susan Singleton – Lynne
    - Nov Next year, conjoin project meeting with CARLI
  + MAC conference
  + SAA
  + RBMS
  + Conferences that we flock to?? Just take opportunities that are coming up in general!!
  + Two groups to address – address both, but will be different ways
    - Decision makers
    - Leaders
  + Webinars
  + Also a check in, we already have some support, keeping their attention, we are not just a project
  + Setting the stage for implementation
* Next Advisory Meeting
  + What needs to happen before we meet again?
    - Results of partner self-study
      * Given to advisors
    - Feature Matrix
    - Interview results
    - Working options for the tools
  + Next meeting…
    - December touch base meeting
    - Feb March have phone conference/touch base meeting
    - Touch-base meetings set up with doodle.
    - Face-2-face meeting in April
      * 1st week. 4th and 5th Penciled-In
* Did we reach our goals/outcomes?
  + Selected tools
  + Evaluated framework
  + Next meeting
  + Timeline
    - Requisition happening through NIU?
      * Long-time…☹
      * May still have to bid
    - Rebuild timeline off of white paper draft
    - Our draft to edit done in Feb 2014
    - Ask IMLS sooner what kind of publication that they want…
      * Copy editor?
    - What is the final conference?
      * 3 or 4 webinars after the project is done
      * National conferenced held at NIU
        + Speakers
        + Start planning in the summer
        + Who is going to come?

Will they pay to come?

* + - * + Go where the audience already is, for example before or after another conference
        + Backing it up against WebWise?
        + BPE conference
        + Bid to host – LITA conference

Not really the group

* + - * + Our target group done not have the money
        + Combine in-person and online conference
        + Educause?
        + General ALA (Midwinter Jan 2015 Chicago), SAA (Aug 2014)
* Partner Wrap-Up
  + Example story: 7 years ago, RIFT, now technology is not standardized. They aren’t going to make the tags in a few years. The tags that you do have aren’t going to be readable in a couple of years. Be careful which technologies are used.
  + Research data…when does it go in? which version goes in? The most usable one
  + What’s the plan? Next steps right now?
    - Pick which set of principles (offline)
      * Each partner decides, see what is most common
    - Matrix
      * Chris Prom – Google Doc
      * Features need to be decided
      * “boss” of product will be a column (just for filling in)
      * “if your product has these features…you get level X of preservation”
      * Column…”well you can do that right?”
      * Does the product say what skill level you need?
    - Next call in Monday November 5th.
      * Digital preservation principles
      * Be done filling out features/tool, start filling it in “meat”.
      * Split up tools to fill out chart
        + Contact users
        + Look at user forums

What doesn’t work

What tools they use together

* + - More formal outline
    - Vendor contact for full product testing (Drew, Lynne, Jaime)
      * Start Oct 15th – Drew…direct Vendor contact
      * Lynne – take on NIU administrators
        + Some of these things are in the grant budget!
    - Database from survey…was ready
      * Questions altered…so some revisions necessary
      * On the way! – Jaime will take care of
      * Informed consent – hold on to for 3 years
      * Letter for first contact of interviewees is on the wiki
    - Finish Bulk of interviews by the end of this semester.
      * Gathering weird data sets.
      * Make every effort to hit every division.
      * Try to get a good representation.
    - Doodle to set in person face to face partner meeting before advisor meeting
    - Liz’s new self-assessment, check with her – Jaime
      * Done by April.
      * Also bios & characterization
        + Stakeholder analysis
    - Who else should we talk to for interviews??
    - Jeff needs an update…