

**POWRR Institute**  
**Naperville, IL**  
**November 30 – December 1, 2017**

**DAY 1 SCHEDULE**

<b>TIME</b>	<b>WHAT</b>	<b>WHERE</b>	<b>WHO</b>
8:00 - 8:15	Sign In/Breakfast	Room 167	All cohorts*
8:15 - 8:55	Opening Session	Room 167	All cohorts
8:55 - 10:15	Sharing Circles	Room 167	Each cohort with mentor
10:15 - 10:30	Break	TBD	
10:30 - Noon	Expert Speaker	Room 167	All cohorts
Noon - 1:00	Lunch	TBD	
1:00 - 2:45	Case Study Module (60 minutes) Storage 101 Module (45 minutes)	Room 166	Cohorts 1-2
1:00 - 2:45	Technology Instruction Session	Room 167	Cohorts 3-5
2:45 - 3:00	Break	TBD	
3:00 - 4:45	Case Study Module (60 minutes) Storage 101 Module (45 minutes)	Room 166	Cohorts 3-5
3:00 - 4:45	Technology Instruction Session	Room 167	Cohorts 1-2
4:45 - 5:00	Debrief/Dinner planning	Room 167	All cohorts

\*There will be a maximum of 30 participants, divided into 5 cohorts of 6 people. Each cohort will be assigned a mentor for the duration of the POWRR Institute.

## DAY 2 SCHEDULE

Instructor	<u>Stacey Erdman</u> Consulting Instructor	<u>Jaime Schumacher</u> Consulting Instructor	<u>Lynne Thomas</u> Case Study Instructor	<u>Drew VandeCreek</u> Facilitator	<u>Martin Kong</u> Technology Instructor	<u>Dorothea Salo</u> Technology Instructor
8:00-8:10	<b>Opening – Room 119</b>					
8:15-10:00	<b>Walk the Workflow</b> Cohorts 1-2 Room 121	<b>Walk the Workflow Cohorts</b> 3-5 Room 119	<i>Assisting Room 119</i>	<i>Assisting Room 121</i>	<i>Assisting Room 119</i>	<i>Assisting Room 121</i>
10:15 - 10:30	<b>Break – TBD</b>					
10:15-11:15	<b>Consultations</b> Cohort 1 <i>Rooms 251A, 251B, and 251C</i>			<b>Cohort Meeting</b> Cohort 5 <i>Room 251E</i>	<b>Tech Skills 201</b> <i>Room 119</i>	<b>PROUD</b> <i>Room 121</i>
11:15-12:15	<b>Consultations</b> Cohort 2 <i>Rooms 251A, 251B, and 251C</i>			<b>Cohort Meeting</b> Cohort 1 <i>Room 251E</i>	<b>Tech Skills 201</b> <i>Room 119</i>	<b>Web Archiving</b> <i>Room 121</i>
12:15-1:15	<b>Lunch – TBD</b>					
1:15-2:15	<b>Consultations</b> Cohort 3 <i>Rooms 251A, 251B, and 251C</i>			<b>Cohort Meeting</b> Cohort 2 <i>Room 251E</i>	<b>Archivematica</b> <i>Room 119</i>	<b>PROUD</b> <i>Room 121</i>
2:15-2:25	<b>Break – TBD</b>					
2:25-3:25	<b>Consultations</b> Cohort 4 <i>Rooms 251A, 251B, and 251C</i>			<b>Cohort Meeting</b> Cohort 3 <i>Room 251E</i>	<b>Tech Skills 201</b> <i>Room 119</i>	<b>PROUD</b> <i>Room 121</i>
3:25-3:35	<b>Break – TBD</b>					
3:35-4:35	<b>Consultations</b> Cohort 5 <i>Rooms 251A, 251B, and 251C</i>			<b>Cohort Meeting</b> Cohort 4 <i>Room 251E</i>	<b>Archivematica</b> <i>Room 119</i>	<b>Web Archiving</b> <i>Room 121</i>
4:35-5:00	<b>Wrap up &amp; Evaluations - Room 119</b>					

## SESSION & MODULE BRIEF DESCRIPTIONS

### DAY ONE

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**Opening Session** – An introduction to the Institute, including deliverables and expectations, and a presentation on the POWRR approach to the Digital Preservation Lifecycle.

**Sharing Circles** – Each cohort (made up of 6 members, at most) is introduced to their cohort mentor and each member is allotted time to introduce themselves and their institutional situation as it relates to the Digital Preservation Lifecycle.

**Expert Speaker** – An expert in the field of digital curation and preservation will speak and lead an activity. Karl Blumenthal of the Internet Archive, is scheduled to speak at this POWRR Institute.

**Case Study Module** – A practitioner from the field of libraries or archives will present their case study. The case study will cover how they implemented a digital curation and preservation workflow successfully at an institution that is similar to those represented by the Institute participants.

**Storage 101 Module** – Many cultural-heritage organizations have found storage to be a barrier to digitization and digital preservation projects. Thinking through amount, type, and cost requirements is difficult, and some storage options come with hidden “gotcha” costs. This module walks learners through viable options for short-term backup and long-term storage.

**Technology Instruction Session** – Many practitioners are overwhelmed by the prospect of engaging with open source software, the OAIS model, basic operating systems, file formats, and other technologies. This session approaches these things in a very basic way, enabling practitioners to use technology confidently as they create a digital preservation workflow that makes sense for their institutional needs and capabilities.

### DAY TWO

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**Walk the Workflow** – Each participant will be provided the opportunity to step through an entire digital preservation workflow, using a provided sample data set, allowing them to envision how a workflow can be setup and deployed locally based on their institutional needs and capabilities. Practitioners will use the open source tools Data Accessioner, Bagger, and Fixity as a part of the workflow.

**Consultations** – Each participant will receive a 30 minute, 1:1 consultation with an instructor to discuss the foundation of a local digital preservation workflow and potential solution models based on an institution’s technical infrastructure, availability of resources, individual technical skill set, and the nature of their digital collections. Each participant will record the consultant’s recommendations and suggested resources on their POWRR Plan\* document.

**Cohort Meetings** – Each cohort will meet to discuss communities of practice, potential solution models, and other topics they self-identify, as well as work on creating the Action Plan within their individual POWRR Plans\*

### Technology Modules: Each cohort will select 3 from the following 4 technology modules being offered

1. **PROUD** – Participants will learn what equipment they need to rescue data from digital media they have in-house; learn how to write-protect several types of digital media; and learn what a disk image is and how to capture one from several types of digital media.
2. **Web Archiving** – Participants will become familiarized with the practice of web archiving; learn common terminology (crawl, seed, WARC, etc.); learn about common tools/services currently available to perform this work (Archive It, Wayback Machine, Heritrix, etc.); explore a scenario provided by the instructor concerning a use case for using WebRecorder in an archival setting; use WebRecorder to capture several websites; and move WARC files to storage environment.
3. **Tech Skills 201** – Participants will explore the workflows associated with digital preservation. In particular, they will review skills that would be helpful to have to facilitate the use of digital preservation tools such as how to extract files in an operating system and how to work with a command line interface. Furthermore, they will discuss about virtual machines and their applicability to digital preservation.
4. **Archivematica** – Participants will learn the concept of microservices and how they are employed within Archivematica; understand installation/deployment options for Archivematica; understand how Archivematica utilizes/meets OAIS standards; understand the content of packages produced by Archivematica (SIP, AIP, DIP), and how files are normalized, and process a digital transfer (aka accessioned digital objects) from start to finish - turn them into Submission Information Packages (SIPs), apply format policies and create high-quality, repository-independent Archival Information Packages (AIP) using METS, PREMIS and Bagit.

### \*POWRR Plan - Description

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The *POWRR Plan* is a customized document for each member of an Institute's cohort and is the primary deliverable for each 2-day POWRR Institute. It is a cloud-based document (Google Doc), divided into 4 sections, that will be initiated once a participant is accepted into an Institute. Some sections will be populated from the participant's initial application, with more details added post-acceptance. The purpose of the *POWRR Plan* is to guide POWRR Institute participants as they:

- Document the current state of their digital preservation activities
- Define their organization's needs and set goals accordingly
- Determine what particular challenges and advantages will guide their decisions
- Document the knowledge acquired during the POWRR Institute
- Capture their organization's potential solution model(s) and proposed workflow
- Create an action plan with goals and activities defined at 3, 6, and 12 months

Each member of the Institute cohort will be given the option to either keep their *POWRR Plan* as a cloud-based document that will be updated dynamically online throughout the 2-day Institute using their laptop, or to print out a packet containing their information, with space to write in all of the additional components at the Institute. We will encourage the former, and make back-up copies of each member's *POWRR Plan* to flash drives just prior to their Institute, in the event there are internet connectivity issues. If a cohort member prefers to use a paper copy but does not have the means to print theirs out, the POWRR team will print the packet for them and bring it to the Institute, so that each person is able to have a *POWRR Plan* despite any technology or financial challenges. In the event that a person requires additional accommodations in order to participate, POWRR team members will make every effort to deliver an accessible Institute format and accessible personalized *POWRR Plan*.

## Biographies

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### **Stacey Erdman** (Communications & Community Coordinator, Consulting Instructor)

Stacey N. Erdman is the Digital Archivist at Beloit College. In this position, she has responsibility for the collection, appraisal, organization, preservation, management, and appropriate sharing of archival content deposited with the Beloit College Archives, with a focus on digital materials. She works closely with the College Archivist to shape overall collection policies and on the education of the campus community on matters related to retention and strategic use of the College's historical record. She also works closely with the College's Digital Librarian on the selection, development, production, and marketing of the College's digital collections. She is the former Digital Collections Curator at Northern Illinois University and served as the Technical Coordinator on the first two Digital POWRR Project phases.

### **Jaime Schumacher** (Co-Principal Investigator, Consulting Instructor)

Jaime Schumacher is the Senior Director of Digital Collections & Scholarship at Northern Illinois University Libraries. Jaime served as the original Director for the Digital POWRR Project in its first phase of funding from the IMLS. She earned her M.S. in Library and Information Science from the University of Illinois Urbana-Champaign and holds a B.S. in Computer Technology from Purdue University. Previously, Jaime was an Information Systems Consultant for Deloitte Consulting in Chicago, IL.

### **Lynne Thomas** (Case Study Instructor – Naperville Institute)

Five-time Hugo Award winner Lynne M. Thomas is the Head of the Rare Books and Manuscript Library and Juanita J. and Robert E. Simpson Rare Book and Manuscript Professor at the University of Illinois at Urbana-Champaign, one of the largest public university rare book collections in the country. She previously served as Head of Distinctive Collections and Curator of Rare Books and Special Collections at Northern Illinois University. She co-authored *Special Collections 2.0*, (Libraries Unlimited, 2009) and co-edited *New Directions for Special Collections: An Anthology of Practice*, both with Beth Whittaker (ABC-CLIO, 2016), and is a founding member of the Digital POWRR project. An alumna of Smith College with a degree in French and Comparative Literature, she also holds an MS in Library and Information Science from the University of Illinois at Urbana-Champaign, and an MA in English and American Literature from Northern Illinois University.

### **Drew VandeCreek** (Co-Principal Investigator, Facilitator)

Drew E. VandeCreek is the Director of Digital Scholarship at Northern Illinois University Libraries and co-Director of that institution's Digital Convergence Lab. He has served as Principal Investigator or co-Principal Investigator on grant projects totally over \$3 Million including, *Building Capacity for the Digitization, Dissemination, and Preservation of Southeast Asian Resources*, *Mark Twain's Mississippi Project*, and the *American Archives Digitization Project*. He is a graduate of the College of Wooster and hold a Ph.D. in American History from the University of Virginia.

**Martin Kong** (Technical Instructor)

Martin Kong is the Systems Librarian in the Chicago State University Library. He is responsible for coordinating the unit that manages all of the technology and systems used by the staff in the library. Part of his day-to-day work includes management of the Library's Automated Storage and Retrieval System (ASRS), which is an automated robotic system that holds about 70% of the library's physical collection and also houses most of the University's Archive and Special Collections material. Library patrons can request library materials directly from the ASRS via the catalog and have those materials brought down and checked out to them in a matter of minutes. Martin holds a Master of Science in Library and Information Science from the University of Illinois at Urbana-Champaign (UIUC). He also has a Bachelor of Science in Business Administration with a concentration in Management Information Systems from UIUC as well. He is a member of the American Library Association.

**Dorothea Salo** (Technical Instructor)

Dorothea Salo is a Faculty Associate in the iSchool at the University of Wisconsin at Madison. She teaches "Introduction to Digital Information" and "Code and Power" in the undergraduate Digital Studies program, as well as courses on metadata, linked data, libraries and publishing industries, and digital libraries on the master's level. She has written and presented internationally on privacy, scholarly publishing, copyright, institutional repositories, linked data, and data curation. She holds an MA in Library and Information Studies and another in Spanish from UW-Madison.

*Note: The cloud-based document's permissions would be set so that only the individual participant and the Institute instructors can access and edit that person's POWRR Plan online.*