

Digital POWRR

Preserving digital Objects With Restricted Resources

MEETING MINUTES

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 bang for our buck
- We cannot do 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, archivemata, 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 does 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...