

Digital POWRR

Preserving digital Objects With Restricted Resources

MEETING MINUTES

Date: Thursday, October 11, 2012

Time: 8:30am – 4:30pm

Place of Meeting: Holmes Student Center – University Suite

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

- **Basic Introductions**
 - **Who, What, and Where?**
 - **Overview of 2-Day Agenda**
 - **Housekeeping**
 - **Expected Outcomes**
 - Digital preservation tool selections finalized
 - Project timeline finalized
 - Initial draft of evaluative framework created
 - Next advisory board meeting scheduled
 - **Brief History of this Project**
 - “Original” grant submitted in 2008 via a dime novel project
 - That was denied because we did not have long-term preservation plan
 - CARLI did not have the resources to do long-term preservation grant
 - Original grant asked for funding servers at the institutions, and installing a hub and spoke/LOCKSS set-up that would also allow community institutions to pay for storage
 - New version - studying the problem instead of creating a “product”
 - Project plan and budget was written over a long weekend
 - Cloud based is too expensive?? Versus setting up a separate server system? What would be best for different needs and resources?
 - Not necessarily going to find one correct answer, studying many different options and poking at the software
 - Tools in isolation versus using multiple tools at once? Multiple at once...is a lot to take on.
 - What are we doing in terms of the organizational side of things? OAIS? TRAC?
 - We’ve presented at NIU to the board that we need an IR and they decided to form committee, but stuck at that point.
 - End product of this grant project to produce a white paper.
 - Who is our audience?
 - **About Us**
 - **Who we are as institutions**
 - 5 medium and smaller sized institutions
 - CSU – Digitizing historical material and keeping it on external drives. Scanning material and also putting it on internet archive.

College yearbooks that have been digitized are getting a lot of use. Also working on an ETD project.

- IWU – Adding the whole of campus brings in a whole new management aspect. Individuals are so involved in their research and projects that they don't really think about what will happen to the data years down the road. Born-digital records are not really distributed or kept safe. They meet their own needs, and after things like websites fail they forget after some time and continue on without making changes. Capturing intellectual processes that are not just writing, including art, performances, etc.
- ISU - Administrators have different understandings of digital preservation which causes shifts. Dealing with the attitude that people do not want to put their information online because they think people will not visit in person then.
- **The numbers: Budgets, Faculty, Students**
 - Bigger budgets means more good ideas get funded
- **What we mean by “Restricted Resources”**
 - Individuals on campus not being educated
 - Example – WIU has organizational partners that use dial-up
- **Dig Preservation Budgets, Tech Skills, Staffing**
 - It is not just preserving the data from the library, but also campus wide which requires more resources
- **Why we are involved in this project**
 - Transitioning from just digitizing mass amounts of data to making some more selections, wanting to keep this information long-term, and also for other institutions
 - We'd like to be able to keep this data safe
 - We had an early start on the scanning, but not on the preservation
- **What is Digital Preservation?**
 - **Each Advisor: Your thoughts/theories/experiences & What is your biggest “lesson learned” in your experiences with digital preservation projects? What do you wish someone had told you when you first tackled the challenge of digital preservation?**
 - Amy – State Library of North Carolina has two main projects. Maintaining their content (born-digital and digitized) and the second is educating others. Letting individuals know they have a responsibility in the digital preservation process. Library has some LSTA funding. Archives (which is responsible for state and local records) has only two staff members. Have found it makes sense to spend money on outside storage because it is less (maybe a 1/3) than the cost of a staff member. We have to remember that “good may be good enough”, don't start with the complex get the simple stuff taken care of first. When talking to administration do not phrase it as a ‘project’, instead as a ‘program’. Always have talking points and specific examples. Keep activities at the forefront and build digital preservation in with that, they are all components of the larger cycle.
 - Jerry – Preservation and access are two different things. “If you can't look at it you haven't preserved it”. Access is the golden standard of preservation. The use

of digital technologies to make sure that everything you see as significant is still accessible. Involves technology as well as social and legal factors. Workflow is critical! We know there isn't a lot of control over what authors do. First do no harm. It is not about preserving information it is about preserving knowledge. It's about the context that allows us to understand what it meant and why it is important.

- Chris – Agrees with Jerry & Amy. Most critical, don't try to do everything at once. The situation is easily overwhelming. It is deciding what is important and seeing what is already taking place or what can easily be done. Don't try to do it on your own. Learning not to think about individual items, but how to maintain a collection of items. Don't write code, unless you really have a new problem and then adapt. Has experience writing own code and keeping up with that is a nightmare. It is about establishing trust with the group of people that you are willing to serve.
- Martin – We have to understand digital preservation as core to our operations! Access is the point of preservation. Digitization is not digital preservation. Collaboration is critical to long term information survival. Importance of developing a shared perspective on digital preservation, we have to be able to educate on what we are trying to do and where we are trying to go. Develop some expertise in a smaller area to build on. Crawl before you walk. Show don't tell with administrators.
- Steve – Coming from left field. Outside the university level. At Maine Historical Society. Maine Memory project is about access. Has a goal to be representative. Developed standards so that they did not have to go back and redo things later. Not claiming it as a digital preservation project. Creating priorities of collections; begin with the projects that are doable and necessary/essential. Remind administrators why these things are important. Including the watermark on some material helped to give some context to the material.
- Liz – Need to work on coming up with an agreed upon vocabulary. Backup is only a component of preservation it is not digital preservation. Have policies written in selection for digital preservation. Understand the mandates either legal or ethical. Use of risk-management, Drambora? As a way of planning but also getting to "yes" from administration. Creation standards for metadata enterprise wide. Collaboration! Technology is not the biggest problem. The more difficult aspect is dealing with the people. One solution will not meet all your needs. Multiple technology solutions will be necessary. Piloting is a good idea! Don't sell features.
- **Going over the revised plan & suggestions for moving forward**
 - Done as an NLG.
 - So what is the issue that needs to be solved here?
 - Suggested tools
 - Education
 - Organization
 - Grid into the report?
 - If you have this much in resources, and this much in data...this could be your solution type of idea

- Using our institutions as case studies with additional information that overlaps, case studies gives the tools and process context
 - Establishing a framework for these case studies, a digital preservation program or infrastructure
 - Cannot just address the tools
 - Wiki can act as extra information that will not fit into restraints of white paper
 - To include: State with a clear statement of the problem. Literature review. Include constraining factors.
 - Bringing in someone from the outside to make headway within the university/community. Even webinars.
 - IMLS should give projects something from the project advisor that they (we) can use as a speaking piece.
 - CARLI brings together people who make decisions. At the annual meeting.
 - It's also a study of relationships and what works well or what does not work
 - Not only risk but also adding digital continuity. Depends on your audience. Instead of disaster plan, business continuity.
 - Tools: How easy would it be to stop using it? It is possible to stop using specific tool? How do we transfer to a new tool?
 - Keeping information mobile, you will have to move systems at some point. Keeping collections together and with context. Testing moving between tools.
 - We don't have people to manage this alone, WORK COLLABORATIVELY!
- **Patrick Dawson, Dean of Libraries, Welcome Remarks**
- **Approaching this Project**
 - **Our Current Approach**
 - **Budget**
 - Tool driven
 - LOCKSS money could be repurposed
 - **Project Timeline**
 - Missing education element and other gaps
 - **Tool Selection and Testing**
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 - **Digital Object Surveys (Campus surveys)**
 - 7b – do you care if your colleagues can access these files?
 - What other items (not research data) might be valuable to others?
 - Do you even want to share this information?
 - What kind of collections do you have? File formats?
 - What is the significance of your work? Explain why it is important?
 - Is there a national or subject based repository where you keep your data?
 - What would your approach be to recover your files?
 - What would you give us if it was simple one-click archiving? Would you do it?
 - It is important that your data is kept controlled/private? Expectation of privacy?
 - Open access policies?? Do we have them? No, University of North Texas does. COAPI
 - **Advisors' Recommended Approach**

- - **What are we missing/forgetting?**
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 - **Who else should we be talking to?**
 -
- **SCOPE**
 - Digital baby steps
 - Go do these things
 - Policy and practice
 - Define
 - Make choices
 - Tools that can help
 - Principles
 - What are we committing to do?
 - Administration and practicalities
 - How it gets done?
 - Who pays for it?
- **REPORT** (Possibilities.. beware scope creep)
 - Case studies
 - Statement of problem
 - Tools
 - Criteria for testing
 - Framework
 - Organization issues
 - Literature review
 - Obstacles
 - Starting a program
 - Policy and practice (higher level)
 - How to assess resources
 - What does the reader out of this paper want?
 - Ingest sheets?
 - What do I do with information now? 5 years from now?
 - CINCH steps
 - Digital baby steps document OCLC
 - Is this material accessible?
 - Will we harm the material through access?
 - Forensics and recovery and packaging
 - Will have several different audiences...
 - Dean and directors?
 - Digital archivists?
 - Librarians?
 - IT?
 - At which conferences will this paper be presented?
 - Different parts of the paper at different venues
 - More than one?
 - ****Program manager**** Drambora term-“Owner”?
 - Executive summary = ammo.

- Supplement with “tear-offs” from wiki/website in simple/bullet point form?
 - Not in paper
 - Aimed at other specific audiences?
 - White paper fixes things in time
- From White Board - Report (with some order) – a fixed document
 - Audience – Project Manager
 - Statement of purpose
 - Lit review
 - Case study
 - Trends
 - Obstacles
 - Commonalities
 - Tools
 - Evaluation
 - Framework
 - Executive summary
- Case study specifics
 - Picture of what the institution looks like
 - Staff
 - Profile of point person/project lead?
 - Collections (Focus campus wide)
 - Budgets
 - Self-assessment from Liz
 - Results from campus wide surveys
 - List of current activities? Covered in self-assessment?
 - Any existing digital preservation program/activity
 - IT infrastructure
 - Organizational commitment
 - A written commitment?
 - Verbal commitment?
 - Money commitment?
- Survey/Questionnaire
 - Additional questions...
 - What kind of data?
 - Tell us about your work...
 - And what kind of files are they?
 - Volume?
 - Layered data? (some for testing)
 - National grants with mandated preservation/retention plans
 - They make stuff up...?
 - Will these rules be enforced?
 - Who are we talking to?
 - Random sampling?
 - Faculty and staff?
 - Specific subjects?

- Someone from every department.
 - 150 interviews are not necessary.
 - Sports?
 - Post docs? Graduate students?
 - Admission records?
 - Websites? E-mail? Course websites?
 - University relations, Communications, Media, Photos
 - Focus on scholarship files to keep realistic scope
 - Enlist the help of subject librarians to get an “in”?
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- **Structuring the White Paper/Final Report**
 - **What do we want coming out of this?**
 - Value added to the profession.
 - Taking this topic from theory to more of practice
 - A tool to guide us through the process
 - Working from the “spirit” rather than the “letter”
 - “Not bad”, “Good enough”, “restricted resources”
 - Establishing principles / framework
 - Commitment to preserve (certain) data
 - Follow national/international standards in the field
 - NISO + IMLS
 - TRAC framework, gold standard?
 - NESTOR – 10 Principles
 - There are these standards that we shoot for that we are all aspiring to reach, and the white paper will explain some approaches to try and reach those goals for similar institutions
 - ICPSR – Principles and good practice for preserving data
 - Trustworthy digital repositories (TDR) 2003 “to meet expectations, dig laps must...”
 - Application of principles, evaluative tool in case study of principles???
 - Policy issues?
 - Infrastructure?
 - Program planning? Call it “getting started”
 - “Incremental steps to digital preservation”
 - Practical Steps
 - Informed Steps
 - Resources assessment?
 - Funding? Tips to look for funding.
 - Digital preservation readiness checklists (DCP?)
 - Talk about advantages of being in a small institution
 - Forced to be creative
 - Less people to get approval from
 - Organizational models
 - Practically oriented

- What can we do without funding?
 - Set the bar a little bit harder
 - Education?
 - Hugh value in this. Digital preservation still fairly new.
 - Learning curve – everyone on the same page
 - Tool evaluation
 - **Advisors’ experience with creating similar reports**
 - Charles Bailey lit review???
 - **Suggestions for structure (tiered?), approach, targeted audience, etc.**
- **Tools/Technologies/Services Selection**
 - Not an apples to apples list
 - ADD - Internet Archive, OCLC Digital Archive,
 - REMOVE – Amazon cloud, Google cloud, Content DM, Bagit, Jhove, JISC, EchoDepp, PANIC, IRODS & Dcape (not for small...), Dspace, Fedora,
 - Second list for backup??? Carbonite, Amazon Glacier,
 - Storage services versus Management services? Make categories.
 - Pros and cons of the tools in the categories
 - Appendix of what front end works with storage
 - **Finalize Master List**
 - Categorize and Prioritize instead of just listing.