## 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…