



DIGITIZATION REPORT

Anonymized Client Sample

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Executive Summary

The goal of this consultation was to help a Library in reaching their strategic initiative to have the digitization unit become more successful in the academic library environment where they find themselves based. The following is a set of observations and recommendations focused on the administration of the digital program that have been taken from a much longer report.

Administration of the Digitization Program

Observations

There are so many small, one to two person department within the library and digitization overlaps many of them. It seems to this consultant that there would be a great deal of synergy were Digital Collections, Preservation, Cataloging, Special Collections, and Archives to work together as one division or unit within the library all answering to a digital Initiatives Librarian. In the interim, until a Digital Initiatives Librarian can be hired, and multiple departments merged into one, a strong Digital Team and the Associate Dean will have to make decisions and recommendations for work.

The University does not appear to have a standard way of collecting, storing, or most importantly using quantitative and qualitative data to analyze its work. This is something that should be approached library-wide and all departments should be gathering and saving data. The Associate Dean of Technology should work with staff to determine the best methodologies for saving the data. Library staff may want to work with a consultant to develop policies, processes, and procedures for this issue.

In the future, it is possible that the campus, and the Library itself may be asked to justify expenditures, programs, and even to defend the value of humanities in our culture. Research into audience needs, statistical data collection, and regular evaluations help an institution to avoid self-referential decision making and can be used to support the work being done on campus to respond to the needs and desires of University audiences, which include state taxpayers.

Recommendations

Create a job description for a **Steering Team**. The steering team should have responsibility for policy approval and adoption. The steering team should also be responsible for creating goals for the digital program. Those goals should have measurable objectives and benchmarks within a timeline for evaluation. Six, twelve, and eighteen-month goals should be set, and evaluation criteria adopted. The steering team should include someone who may speak about user data and to incorporate more evaluation.

“A nuanced understanding of user and stakeholder needs may result in a more helpful and valued resource. Knowing what drives the research of one’s users and the mission of one’s institution can help project leaders shape a resource to serve those communities better”.[1]

An evaluator should be identified on the team up front and statistics necessary for evaluation (Google analytics is one such tool) identified. I would recommend both quantitative and qualitative evaluations be undertaken. In discussing this on site it is possible that some of this data is being collected in part, but is not centralized, stored, or analyzed regularly. As a note, statistics should be used in combination with other qualitative data sources and never to micro-manage operations with digital collections any more than they are with other library units such as reference. Data can be useful to help guide activity but should not drive it.

[1] http://www.sr.ithaka.org/sites/default/files/reports/SR_IMLS_20140129.pdf

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Questions to ask can include, but are not limited to:

- Number of web pages created in support of digital collections
- Number of web hits, number of page views, and duration of page view (average length of page view)
- Ranking of site in Google
- Number of visits to the Library based on digital collection

Qualitative measures: Periodically the Digital Program should undertake a qualitative assessment of the digital initiative's program. Again, some of this data may be collected now but it was unclear where the information lived or who oversaw the information at this time. Qualitative assessments can focus on:

- Does the program meet the needs of the target audience/s?
- Is the content useful? If so, how is the content being used? If not, how can it be made more useful?
- What content would be more useful?
- How is the content being located? What search capabilities are being used? Would other approaches, such as web exhibits be useful?
- What enhancements do various stakeholders desire?

Regular evaluation of the Library's digital program is important to the growth of the program and ongoing support. Qualitative assessments should query the full audience range. Approaches to qualitative assessments can include online surveys, focus groups and personal interviews. Qualitative assessments should be done at regular intervals no less than annually, whereas quantitative analysis should occur more frequently, especially as program changes are implemented to judge their effectiveness.

The steering team should be responsible for evaluating the effectiveness of the digital program in meeting the ultimate goals of increasing productivity and expanding access to collection content. The steering team should also define communication methodologies and norms for sharing information within the library as across campus. For example, a press release when community collections are digitized, an internal email to library staff sent when a project begins and information is posted on library front page when it begins, as the staff finds interesting information, and when projects are complete.

- The steering team should include:
 - o Associate Dean
 - o Associate Dean for Public Services and Technologies
 - o IT or University Systems
 - o PR/Marketing Assistant
 - o Development Office
 - o Digital Initiatives Librarian

Create a job description for the Digital Team as well. The digital team should have a single identified chairperson (Digital Initiative Librarian) who can act as the facilitator and driver of this group. The Chair can report out to the steering team on a regular basis and bring forth materials for the steering team to review. The digital team should include:

- o Associate Dean (representing Administration who is responsible for the identification of resources, budget and personnel)
- o IT or University Systems
- o Preservation

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- o Archives
- o Special Collections
- o Catalog Librarian
- o Digital Collections
- o Library Liaisons (evangelists with and for faculty)
- o Student and or Alumni representation

- The digital team should be a working body that is drafting necessary policy and procedures documents as well as determining collection selection priorities.
- Once a policy or document meets with general approval it needs to be passed on to the Steering Team for immediate adoption and approval. Once a policy or document is adopted by the Steering Team it should appear on the University Library website. In an effort to provide transparency and fidelity across multiple divisions within the Library the sharing and posting of policies should create additional buy-in.
- Forms and documents to be focused on first include any revision to the Collections Selection matrix that the Library would like to make. The Collection Selection Matrix is a tool to help identify and prioritize collections for digitization.
- After that, file naming protocols need to be adopted institution wide.
- Develop on-demand protocols. The Digital Collections department gets requests weekly for items, and more at the end of the semester. This consultant believes that on-demand requests for materials in Special Collections and Archives should be generating high-quality master images that can then be managed and put online once the material has been run through a copyright review and has had metadata created—but this will require protocols be developed.
- Formalize the solicitation process.
 - o A subset of the digital team should review the digital proposal form shared during the site visit and re-work it so that it makes sense for the institution.
 - o Once the process is approved by the steering team, Systems can create a form on the Library's intranet and at the next all staff meeting for the Library the process can be presented and promoted.
 - o This process can be shared with faculty as well so that they can request materials for their classrooms.
- Metadata guidelines need to be written and adopted by the Library. The metadata librarian, Special Collections and Archives should work with a consultant to create mutually agreed upon local implementation guidelines for metadata creation based on standards and best practices in the field
- Imaging guidelines should be promoted by the digital team, it appears as if the institution has informally adopted FADGI[2] but those capture guidelines do need to be promoted. Copyright procedures for on-demand digitization could be addressed after that. Imaging guidelines should be followed by the digitization lab and Archives staff creating any on-demand materials.

[2] The CDP best practices V2 are written in common language and are written for non-techies but they provide good guidance for a number of materials

<http://www.lyrasis.org/LYRASIS%20Digital/Pages/Preservation%20Services/Resources%20and%20Publications/Digital%20Toolbox/Best-Practices.aspx>

A more technical document—but also a strong one would be the Federal Agencies Digitization Guidelines

<http://www.digitizationguidelines.gov/guidelines/digitize-technical.html> I particularly like their recommendations for capturing text on pages 58 and 59. These charts can be copied and hung up in the imaging labs.

Want to Learn More? Contact our Subject Matter Experts.

Digitization & Metadata Services

Our subject matter experts have decades of experience in metadata analysis, workflows, and standards needed to support the curation, management, and infrastructure of digital objects. We can evaluate digitization workflows and processes to improve productivity, efficiency and manage the digital life-cycle of your collections.

Allow us to advise you on every component of your product, including production unit workflow, identifying new equipment and software needs, and developing imaging guidelines.



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- With LYRASILS since 2010
- Previously worked with
- Collaborative Digitization Program, 2005-2010
- Research interest in Museums, Archives,
- and Special Collections Workflows,
- Digitization and Metadata Planning and
- Creation, Digital Preservation Readiness
- Assessments, Preservation Assessments,
- Strategic Planning, and Project Management