



Digitization: Planning, Selection and Outsourcing Options



Connecting to Collections Ohio

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Agenda

- Vision and Planning
- Selection for Digitization
- Outsourcing

The Raymond Sallens Club met Nov 21 in the Auditorium of the Consolidated School. Mrs W.R. Epperson, Vice Pres. presided. The minutes of the preceding meeting were read and approved - after a correction.

Mrs M. Kengie suggested that the Club sponsor the Y. teen organization - and explained that they would put on one program during the year - the Club voted yes - to the suggestion - the program will include both the O. D. S. + R. S. Y. teens.

Mrs M. Neill reported that she had sent cards to those in sorrow and those who were ill.

Mrs Clarke reported a basket of fruit sent to the S. B. Hospital and Home for the aged. She was authorized to pay bill for same - Mrs Lewis had charge of program on "Ibrama" - Presenting "Bear Neck" of the Elizabethan era - Characters were:





Vision

- Establish a vision (mission)
- Focus on what you are trying to accomplish
- Don't get bogged down in the details now





Planning: Audience and Users

- Important to define audience
 - ✧ General user or visitor
 - ✧ K-16 and Life Long Learning
 - ✧ Practitioners
 - ✧ Researchers & Scholars
 - ✧ Business Community
- How will the digital materials be used?





Planning: Audience and Users

- Communication with your audience
- Seek input from the users
- Anticipate future uses





Planning: Define Goals/Objectives

- Set SMART objectives
- Change will cause you to revise
- Beware of scope creep
- Document changes during the life of the project





Selection: Collection Development



Materials Selection

- Write a selection policy
 - ✧ A collection policy for digitization
- You need to identify a method/process of selection
 - ✧ Consistent
 - ✧ Clear
 - ✧ Flexible
 - ✧ Defendable





Selection Policy/Criteria

- Consider
 - ✧ What is the purpose of the digitization effort?
 - ✧ What is the focus of the digitization effort?
 - Topics, areas of emphasis, subjects, people, timeframes, geographic area
 - ✧ Audience needs?





Materials Selection

- Selection is based on your audience and collections
- Labor intensive
- Consider handling time
- Preservation needs?
- Value?





Selection – Elements to Consider

- Whole collections or samples
- Condition
- One or many collections
- Similar items – Themes
- Finding aids?
- Do you want to use digitization to ease workflow





Selection – Technical Ability

- “Scannable”
 - ✧ What equipment do you have and what kinds of materials can it accommodate? OR, will you consider outsourcing?
 - ✧ Manuscript material – can you accommodate transcripts? Is OCR an option? Will it scan well?
 - ✧ Volume: how much material can you accommodate in house? OR, will you consider outsourcing?





Creating a Selection Policy

- Why do we want to scan this?
 - ✧ Revert to mission!
- Will it help our users?
- Will it help our staff?
- Are there technical or preservation restrictions?





Digitization for Preservation?

- Digitization is an excellent tool for increasing access to resources
- Digitization is NOT necessarily a preservation medium
- Digital access can preserve original through reduced handling
- Can use the project to accomplish preservation tasks



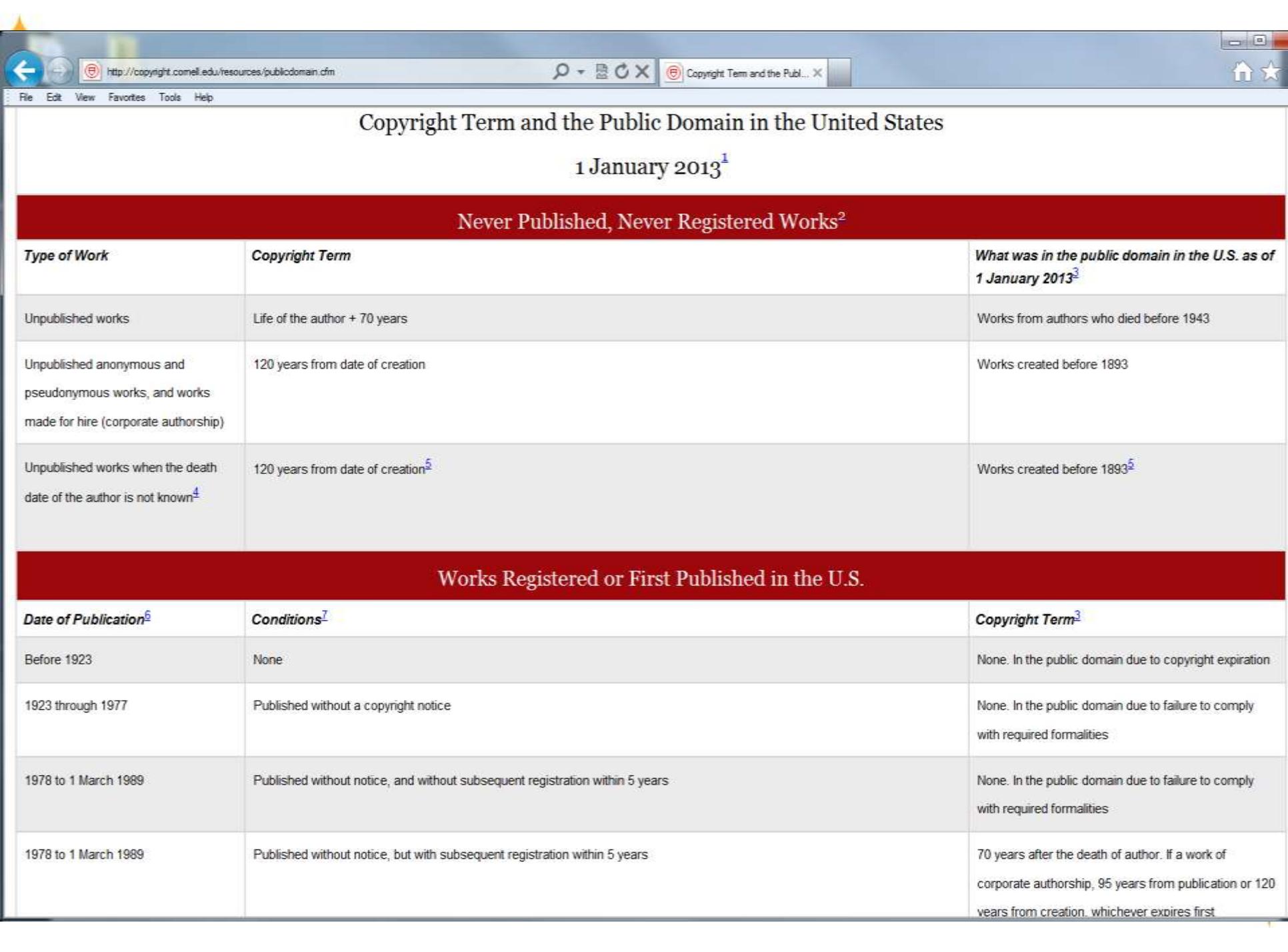


Legal Issues

- Copyright vs. ownership
- Digital rights
- Donor holds rights?
- Revisit deeds of gift
- Special consideration
 - ✧ Photographs, personal letters, diaries
 - ✧ NAGPRA
 - ✧ Music

<http://copyright.cornell.edu/resources/publicdomain.cfm>





Copyright Term and the Public Domain in the United States

1 January 2013¹

Never Published, Never Registered Works²

<i>Type of Work</i>	<i>Copyright Term</i>	<i>What was in the public domain in the U.S. as of 1 January 2013³</i>
Unpublished works	Life of the author + 70 years	Works from authors who died before 1943
Unpublished anonymous and pseudonymous works, and works made for hire (corporate authorship)	120 years from date of creation	Works created before 1893
Unpublished works when the death date of the author is not known ⁴	120 years from date of creation ⁵	Works created before 1893 ⁵

Works Registered or First Published in the U.S.

<i>Date of Publication⁶</i>	<i>Conditions⁷</i>	<i>Copyright Term³</i>
Before 1923	None	None. In the public domain due to copyright expiration
1923 through 1977	Published without a copyright notice	None. In the public domain due to failure to comply with required formalities
1978 to 1 March 1989	Published without notice, and without subsequent registration within 5 years	None. In the public domain due to failure to comply with required formalities
1978 to 1 March 1989	Published without notice, but with subsequent registration within 5 years	70 years after the death of author. If a work of corporate authorship, 95 years from publication or 120 years from creation, whichever expires first

Sound Recordings Published in the United States

<i>Date of Fixation/Publication</i>	<i>Conditions</i>	<i>What was in the public domain in the U.S. as of 1 January 2013³</i>
Fixed prior to 15 Feb. 1972	None	Subject to state statutory and/or common law protection. Fully enters the public domain on 15 Feb. 2067
15 Feb 1972 to 1978	Published without notice (i.e., ¹⁵ year of publication, and name of copyright owner) ¹⁵	In the public domain
15 Feb. 1972 to 1978	Published with notice	95 years from publication. 2068 at the earliest
1978 to 1 March 1989	Published without notice, and without subsequent registration	In the public domain
1978 to 1 March 1989	Published with notice	70 years after death of author, or if work of corporate authorship, the shorter of 95 years from publication, or 120 years from creation. 2049 at the earliest
After 1 March 1989	None	70 years after death of author, or if work of corporate authorship, the shorter of 95 years from publication, or 120 years from creation. 2049 at the earliest

Sound Recordings Published Outside the United States

Prior to 1923	None	Subject to state statutory and/or common law protection. Fully enters the public domain on 15 Feb. 2067
1923 to 1 March 1989	In the public domain in its home country as of 1 Jan. 1996 or there was US publication within 30 days of the foreign publication (but see special cases)	Subject to state common law protection. Enters the public domain on 15 Feb. 2067
1923 to 15 Feb. 1972	Not in the public domain in its home country as of 1 Jan. 1996. At least one author of the work was not a US citizen or was living abroad,	Enters public domain on 15 Feb. 2067



Outsourcing



Outsourcing

- What is outsourcing?
 - ✧ Outsourcing is subcontracting a process, such as product design or manufacturing, to a third-party company – *Wikipedia*
- What can you outsource?
 - ✧ Digitization
 - Different media types
 - ✧ Metadata
 - ✧ Web design
 - ✧ Hosting (repositories)





Why Outsource?

- No “right” answer
- Consider the pros/cons within the context of **your**
 - ✧ Project
 - ✧ Needs
 - ✧ Equipment
 - ✧ Timelines
 - ✧ Original materials
 - ✧ Funding
 - ✧ Digital preservation





In House or Outsourcing: Considerations

- Is your organization committed to ongoing digitization? Or, is this a one-time project?
- Does the original source material require specialized equipment?
- You can outsource particular components





In-House Pros and Cons

- Pros

- ✧ Develop experience and knowledge
- ✧ More control over the process and materials
- ✧ Requirements can be adjusted as you go

- Cons

- ✧ Large initial and ongoing investment
- ✧ Longer implement
- ✧ Limited production capability
- ✧ Expertise not always available





Outsource Pros and Cons

- Pros
 - ✧ Less investment
 - ✧ On-site expertise
 - ✧ Less risk to the organization; vendor absorbs cost of technology obsolescence, failures, downtime, etc.
- Cons
 - ✧ Less control of process and quality
 - ✧ Complex contractual process; specs must be clearly defined at the beginning; problems must be negotiated
 - ✧ Loss of physical control over the source materials





Some Quick Criteria

- In house
 - ✧ Clear project
 - ✧ Expertise in house
 - ✧ Equipment in house
- Outsource
 - ✧ Controlled, up front cost
 - ✧ Aggressive/strict timeline





Vendor Relations

- The vendor will need to know:
 - ✧ Definition of an “item” or “document”
 - ✧ How many items there are
 - ✧ Are the items bound or unbound?
 - ✧ Page dimensions
 - ✧ Handling specifications
 - ✧ Insurance requirements





Vendor Relations

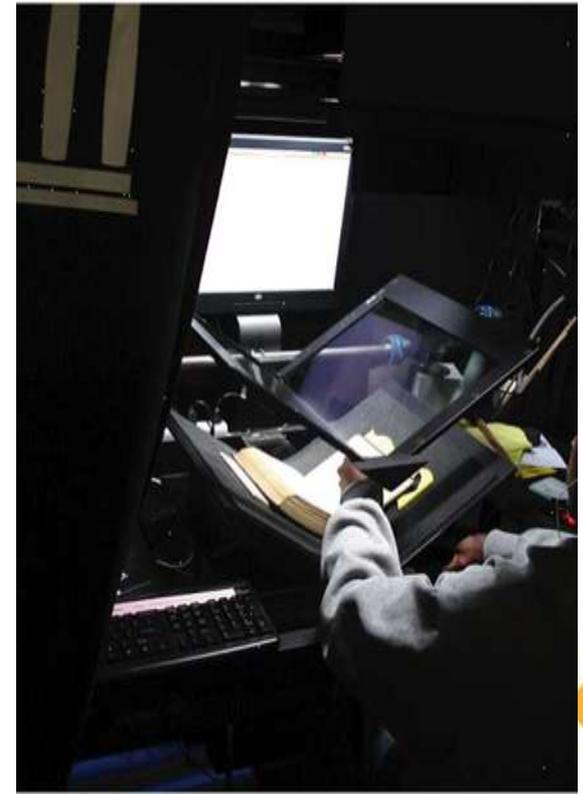
- The vendor will also need to know:
 - ✧ Specifications for the digitization
 - ✧ Resolution
 - ✧ Tonality (bitonal, grayscale, color)
 - ✧ File format(s)
 - ✧ Is compression acceptable
 - ✧ Directory and file naming requirements
 - ✧ Indexing and metadata requirements
 - ✧ Delivery medium and quantity



What the Vendor Wants

- Clear picture of project
 - ✧ They can work with what you have
 - ✧ Clearer you are – better they can respond, otherwise they make decisions/options
 - ✧ Difficulties with comparisons

 - ✧ What is quality control?
 - ✧ What is high quality?
 - ✧ What is preservation standards?
 - ✧ What is metadata?





Consider: Planning

- Outsourcing does NOT replace planning
- Still need clear mission, goals, standards
 - ✧ Doing for preservation?
- Remember:
 - ✧ Documentation of what done in house/outsource, especially when combination



Consider: Costs

- Actual digitization and other services
 - ✧ Included or separated out?
 - Digitization
 - Quality control
 - Metadata
 - ✧ Staff time to prepare, receive, review
 - ✧ Transportation costs



Consider: Needs

- Everyone wants
 - ✧ Fast
 - ✧ High quality
 - ✧ Inexpensive





Final Thoughts

- Decide on mission early on
- It will help you at every stage
- Determine selection criteria
- The quality of your response from a vendor is contingent upon the quality of your request.
- Either option will require management, oversight, and knowledge about digitization





Questions?

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