Wayfinding for Digital Preservation

Frances Harrell, Lead Consultant
Myriad Consulting

Hosted by ALCTS, the Association for Library Collections and Technical Services
Digital Preservation Assessment
Preservation Planning

Assessment

Priorities for Action

Resources Required

Documentation & Advocacy
TRAC & TDR

• Trustworthy Repositories Audit & Certification
  • Published in 2007
  • Developed by NARA and OCLC
  • Currently maintained by Center for Research Libraries

• Trusted Digital Repository Checklist
  • Published in 2011
  • Updates and supersedes original TRAC
  • Adopted by the International Standards Organization: ISO 16363
### NDSA Levels of Preservation - 2013

[https://ndsa.org/](https://ndsa.org/)

<table>
<thead>
<tr>
<th>Storage and Geographic Location</th>
<th>Level 1 (Protect your data)</th>
<th>Level 2 (Know your data)</th>
<th>Level 3 (Monitor your data)</th>
<th>Level 4 (Repair your data)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- Two complete copies that are not collocated</td>
<td>- At least three complete copies</td>
<td>- At least one copy in a geographic location with a different disaster threat</td>
<td>- At least three copies in geographic locations with different disaster threats</td>
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<td></td>
<td>- For data on heterogeneous media (optical discs, hard drives, etc.) get the content off the medium and into your storage system</td>
<td>- At least one copy in a geographic location with a different disaster threat</td>
<td>- Obsolescence monitoring process for your storage system(s) and media</td>
<td>- Have a comprehensive plan in place that will keep files and metadata on currently accessible media or systems</td>
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<thead>
<tr>
<th>File Fixity and Data Integrity</th>
<th>Level 1 (Protect your data)</th>
<th>Level 2 (Know your data)</th>
<th>Level 3 (Monitor your data)</th>
<th>Level 4 (Repair your data)</th>
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<td>- Check file fixity on ingest if it has been provided with the content</td>
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<td></td>
<td>- Create fixity info if it wasn’t provided with the content</td>
<td>- Use write-blockers when working with original media</td>
<td>- Virus-check high risk content</td>
<td>- Virus-check all content</td>
</tr>
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<table>
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<tr>
<th>Information Security</th>
<th>Level 1 (Protect your data)</th>
<th>Level 2 (Know your data)</th>
<th>Level 3 (Monitor your data)</th>
<th>Level 4 (Repair your data)</th>
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<td></td>
<td>- Identify who has read, write, move and delete authorization to</td>
<td>- Document access restrictions for content</td>
<td>- Maintain logs of who performed what actions on files, including deletions</td>
<td>- Perform audit of logs</td>
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Digital Assessment and Training Project

Collaborative, NEH funded project

Updated framework for assessment

Working across regional preservation centers

Training for assessors

Peer assessment framework

https://www.nedcc.org/preservation-training/digital-preservation-assessment-training
Assessment Framework and Case Studies
Assessment Facets

- The Organization
- Staff and Resources
- Policy Infrastructure
- Processes and Workflow
- Technological Resources
Consultant’s Role

Ask questions and do discovery.

Examples:

“Which parts of the organization have responsibility and/or authority for digital collections and digital preservation?”

“Is there a Board of Directors or similar governing organization? Is the organization a part of a larger institution?”
Consultant’s Role

Give Recommendations for improvement.

- Suggestions for improvement
- Not always prioritized
- Not comprehensive

Examples:

“Clarify each staff member’s role in managing digital collections.”

“Create a formal or informal interdepartmental group to continue internal assessment and develop digital preservation plans and priorities (consultant may suggest arrangements for effective decision making that seem evident to them).”
Organizational Structure

- Organizational structure
- Preservation program
- Collections
- Designated community
- Organizational strengths
Organizational Strengths

What are you proud of?
What are people excited about?

What skills do you have in-house?
What’s a success you can build on?

How can you direct these strengths toward innovation and preservation within your organization?
Tribal Cultural Foundation

- 2 full-time staff members
- Digitized photographs, some AV on physical media
- Digital preservation experience from Tribal Digital Stewardship Cohort training
Tribal Cultural Foundation: Designated Community

- Clearly defined audience
- Audience informed policy creation and decision making
  - Collection committee
- Building and maintaining community
  - Local news
  - Facebook
  - Shareholder meetings
- No user stats tracked through access system
“AUDIENCE

Intended audiences for the digital collections include:

• people with indigenous lineage
• shareholders & descendants
• Community members, people who reside in the region or are from the region
• Primary, secondary and post-secondary students and instructors
• General public”
Staff and Resources

- Staffing / Roles
- Staff Training
- Community of Practice
- Budgeting and Resources
- Community of Practice
Large Public Library

- 35 staff members in IT unit
- Digitized photographs and manuscripts
- No digital preservation experience, but in-house imaging lab
Large Public Library: Staffing & Roles

- No roles explicitly manage or contribute to digital preservation
- Conservation techs in lab do digitization
- No manager for digitization projects (vacancy)
- Middle management layer with expertise in storage, metadata, special collections librarianship, and IT
Policy

Infrastructure

- Mission
- Strategic planning for digital preservation
- Collection development
- Selection for digitization
- Digital preservation plans
Small College

“Private liberal arts university with proud HBCU traditions and a future aimed at diversity. We enroll approximately 1,600 highly talented and motivated students from various backgrounds.”

- Digitized photographs
  - Local Photographer
  - Yearbooks
  - AV
- SmugMug + CONTENTdm for access
- 1 archivist
- 1 grant funded digitization specialist
Small College: Selection Policy

- Existing digitization selection policy
  - Specific to only one collection
- No selection policy for digital preservation
  - Campus-wide records management challenge that the Library was aware of
  - No policy for collecting born digital or transferring digital archival materials to archive
  - Content creation across campus, including PR
- Chosen preservation format for photographs - TIFF
  - Some confirmed elements and some implicit elements of a selection policy
Processes and Workflows

- Content Creation: Workflows and Procedures
- Analog to digital reformatting
- Born digital
- Metadata
- Documentation
Reformatting? Why?

- Creating sustainable collections from the start
- Following appropriate standards and best practices
Large Public Library: Reformatting Workflow

- Conservation techs in lab do digitization
- No manager for digitization projects (vacancy)
- No written procedures for reformatting for any physical format
- Conservation techs do original research into best practices for every job and negotiate imaging approach with requesting curators
- New curators have demanded re-imaging for past jobs they are unsatisfied with
Technological Resources

- IT Support
- Working with legacy media
- Data management tools
- Digital storage
- Security of collections and authenticity of users
Art Museum

- 7 library and archives staff, 30 museum staff, plus administrative
- 2.5 IT staff
- Digitized photographs and manuscripts, born digital images of events, digital media art, photodocumentation of object collection, digital videography
- Limited digital preservation expertise in house, full photography and videography staff
Art Museum: IT Support

- Extremely responsive IT Manager
- Strong documentation culture in IT
- Strong professional development culture in IT
- Total reliance on IT for all decision making and execution: “Sean does that”
- Collection care staff has little understanding or interest in IT Support purview
- Storage policies are enterprise business driven, have no collections or preservation paradigm
Small College: Post-Assessment

- Worked with IT during the assessment to find files

- Next steps were included:
  - An inventory
  - Organizing and backing up digitized collections
  - Updating job description for digitization staff person so that it includes digital preservation-related tasks

- Began weekly inter-departmental meetings to achieve recommendations from the report and develop a preservation plan for their digital collections
How Do We Wayfind?

- Assessment
- Review Recommendations
- Prioritize & Budget
- Preservation Plan
Thank You!

Questions?

Frances Harrell

frances@myriad.consulting