



**Report and Recommendations of the Digital Program Working
Group for Initial Elements of a Digital Services Program at the
Orbis Cascade Alliance**

Revisions:

Executive Summary
Implementation Timeline
Discussion of Prototype
2009 September 8

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Executive Summary

This report is the culmination of a digital program planning process approved by Council in 2007 and pursued through the Digital Program Working Group (DPWG) of NWDA. It represents a combined effort of the Alliance NWDA and Digital Services Programs and their associated program managers. At the February 2009 retreat, Council reviewed DPWG's work to date and determined that this effort should be included as one of the five initiatives that comprise the Alliance's new Strategic Agenda. (<http://www.orbiscascade.org/index/strategic-agenda>)

After collecting data from member institutions about digital initiatives and needs, and with additional support from an Institute for Museum and Library Services (IMLS) Collaborative Planning Grant, the DPWG explored and identified solutions to common critical needs throughout the Alliance. According to Alliance and NWDA membership, the challenges that prevent institutions from starting or sustaining digital initiatives are related to hosting content for access, digital preservation, discovery, scanning and reformatting, and sustainability issues.

This report presents findings and recommendation for the initial elements of a digital services program at the Alliance. Such a program will help address member institutions' greatest needs and enable them to move from digital projects to digital programs.

Recommendations

Hosting for Access

The DPWG explored a number of options, including commercial hosting, Alliance member institution hosting, and an Alliance hosted solution of CONTENTdm, dspace, or other systems. Based on needed functionality, costs and administrative considerations, the group recommends the following:

- Pursue inter-institutional hosting options for access. In this initial phase, no more than three host institutions will be selected in order to manage inter-institutional issues. The first hosting institution is Washington State University.
- Pursue the option of using the consortial digital repository service maintained by the Colorado Alliance, the [Colorado] Alliance Digital Repository (ADR).
- To support member institutions that intend to take advantage of OCLC's "quick start" CONTENTdm offer, the Alliance will work with the appropriate training partners to develop two training packages, one entry level and one intermediate, to be delivered either on-site or remotely to reduce costs (for background on this offer, see Appendix B):

Digital Preservation

The DPWG explored a number of options in this area, including MetaArchive, OCLC's Digital Preservation Services, cloud storage, and distributed offline storage. Based on needs, costs, and other concerns, the group recommends:

- Implement Distributed Offline Storage
- Obtain price estimates for Cloud Storage and gauge interest of members (particularly for non-Courier members)
- Provide options for digital preservation training, most likely in partnership with BCR.
- Continue to monitor developments in digital preservation (e.g., MetaArchive, DuraSpace) and standards in the field
- Create a Digital Preservation Working Group or Task Force to investigate whether or not the Alliance might take steps toward becoming a Trusted Digital Repository or determine what activities it might support in order for member institutions to pursue that goal.

Discovery Prototype

The prototype was developed in consonance with the needs of core researcher groups and after an extensive study of those needs. Core users expressed the need to search as broadly as possible, narrow search results with useful limiters, clearly see how to contact holding institutions, and to integrate digitized content with the rich metadata available in finding aids. Based on the completion of the prototype and feedback from Alliance and NWDA members, the group recommends:

- Apply for further grant funding for full prototype implementation. Probable sources include an IMLS National Leadership Grant (due February 1, 2010) and an NEH Preservation and Access, Research and Development Grant (due July 30, 2010). Alliance staff members are currently investigating which opportunity is most likely to be viable and will recommend one program over the other by the time Council meets in September 2009.
- Adopt existing standards for metadata creation to streamline complete integration of data across all institutions.

Scanning and Reformatting

The group considered options for scanning and reformatting that included vendors and inter-institutional solutions. Based on their findings, the group recommends:

- In the short term, it appears most feasible to pilot scanning and reformatting services with Oregon State University. With a developed price structure and the ability to handle the most common formats (paper and photographic prints), this is

a reasonable starting point. Based on that pilot project with OSU and interested institutions, other institutions may develop similar programs. It would be desirable to have at least one Washington institution providing services, and even better to have two: one in the eastern half of the state that might also serve Idaho, and one in the western half to serve that area. Because of the geographical distance of University of Alaska Fairbanks, the cost of transporting materials to and from that institution, and the presence of few members in Alaska, the DPWG does not recommend piloting these services with that institution.

- In the medium to long term, the Alliance should initiate some format-specific projects (film, video, audio, large format) and facilitate contracts with vendors. This should result in favorable pricing, save time at member institutions by putting contract and process management at the consortium level, and allow collaboration between institutions and at the consortium level to gather any additional information needed to assist with these processes and dealing with often-difficult formats.

Administrative Structure

As part of its work, the DPWG looked at issues around sustainability and business planning. Since sustainability is central to program development, it is essential to begin with these considerations in mind. Given this, the group recommends:

- Appoint a new Digital Program Working Group or team in August/September from across the NWDA and Alliance membership. In accordance with other Alliance working groups related to the strategic agenda, this should be a small group of active and committed members with less focus on representation of institutional types. It should retain at least two current DPWG members for continuity. The Digital Services Program Manager should serve as the main manager for this group with the NWDA Program Manager serving as member. The first task for this group will be securing grant funding for further program development and coordination with the Institutional Repository Task Force.
- As part of its preliminary look at fee structures in FY10, the NWDA Steering Team should engage conversations with the Alliance staff and leadership on how to continue support for digital services through this program while laying the groundwork for the opt-in, opt-out fee structure that the NWDA and Alliance membership desires.
- The NWDA and DS program managers should continue to work closely on these programs.
- Begin to define how Alliance staff support the Alliance's digital program through program development in FY10, with the following as one possible configuration:
 - NWDA Program Manager develops and supports training and scanning/reformatting services.

- Digital Services Program Manager develops and supports hosting for access and hosting for preservation.

The DPWG offers these recommendations with full recognition of the pressing need to save and shift costs in the current economic environment. Digital initiatives—especially those that enhance awareness of and access to unique local collections—are becoming increasingly important for and integral to the missions of libraries and archives. These recommendations reveal how the Alliance can begin to help its member institutions build and sustain these programs during this time of great challenge, change, and opportunity.