I’m gonna live forever:
Assessing the preservation of digital collections

- Ann Marie Willer – Director of Preservation Services, NEDCC
- Annie Peterson – Program Leader, LYRASIS
- Craig Haggit – Sr. Catalog Librarian, Western History and Genealogy Department, Denver Public Library
- Stacey Erdman – Digital Preservation & Curation Officer, Arizona State University Libraries

June 22, 2019
1:00 – 2:00 p.m.
Digital Preservation Assessment
Building a Framework, Building a Community

https://www.nedcc.org/dpa

Grant activities:
- Pilot assessments
- Training Institute
- Symposium
- Freely-available handbook: assessment framework, glossary, questionnaire, report template, and resource list.
- Freely-available peer assessment guide
Digital Preservation Assessment and Training Grant
Poll
I’m a digital preservation practitioner: my job is directly related to digital preservation
I am a digital preservation consultant and/or trainer providing services to cultural heritage institutions
I don’t have much experience with digital preservation, but I’m here to learn more
I don’t fit into any of your very narrow categories!
Why?

- Identified needs in the field for:
  - Digital preservation assessment tools that work for small institutions
  - Collaboration across regional preservation organizations
  - Digital preservation training and consulting
NEH Grant 2017 – 2019

• Goals:
  • Digital preservation assessment framework
  • Self-assessment tool
  • Increased consulting capacity
  • Increased awareness of digital preservation needs and prioritization methods
  • Assess small institutions

Created by Birckhead Creative from Noun Project
NEH Grant activities

2017
- Task force meeting
- Round 1 assessments
- Feedback interviews
- Framework update
- Regional Alliance for Preservation (RAP) Meeting

2018
- Round 2 assessments
- Framework update
- Consulting cohort training
- Cohort assessments
- Feedback interviews
- Symposium

2019
- Peer assessment handbook release
- Assessment handbook release
Assessment Locations

Round 1
- CO
- NY
- NC

Round 2
- NE
- PA

Round 3
- WI
- OK
<table>
<thead>
<tr>
<th>NEH Grant activities</th>
<th></th>
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<tbody>
<tr>
<td><strong>18</strong></td>
<td><strong>50</strong></td>
</tr>
<tr>
<td>Assessments completed</td>
<td>Symposium participants</td>
</tr>
<tr>
<td><strong>20</strong></td>
<td><strong>64</strong></td>
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<tr>
<td>Assessors trained</td>
<td>Peer assessment workshop participants</td>
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What’s a digital preservation assessment?
Assessment structure

1. Pre-visit questionnaire
2. Onsite meetings
   - Collections staff
   - IT staff
   - Administrators
   - Board members
   - ...and more!
3. Report

www.neddc.org/dpa
Assessment elements

- The Organization
- Staff and Resources
- Policy Infrastructure
- Processes and Workflows
- Technological resources
Lessons learned

• Build on organizational strengths
• Meet institutions where they are
• Identify best next steps, not ideal goals
• Facilitated conversations with IT were valuable
• It can work with any sized institution

Created by Becris from Noun Project
Denver Public Library’s Experience with the NEDCC Remote Assessment

Craig Haggit
Sr. Catalog Librarian
Western History and Genealogy Dept.
Assessment Planning

**COST**
$250 to library, with remainder from NEDCC’s grant

**STAFF**
Decided who will drive project (Sr. Archivist, in collaboration with Sr. Catalog Librarian)

**QUESTIONNAIRE**
14 pages when complete, setting baseline for assessment
Assessment Framework

All calls included Sr. Archivist and Sr. Cataloger ("Team"), plus…

1. Big Picture
   “Team” only

2. Policies and Procedures
   Imaging Services staff

3. IT Infrastructure
   IT Manager
   Digital Storage lead
   DAS-certified Archivist

4. Wrap-Up
   Dept. Manager
After the Assessment

**Gather stakeholders** immediately after final report received

**Don’t get overwhelmed**

1. Look for low-hanging fruit you can do now
2. Create road map for what to do in 3 months, 6 months…
3. Break into manageable chunks
After the Assessment

Take the long view. Use assessment as a tool

1. Example: CCAHA preservation assessment of the physical space
   - 2007 - Assessment
   - 2013 - City Audit
   - 2017-2020 - $1,000,000 renovation

2. Argue for new / upgraded staff
   - Digital archivist (still hoping)

3. IT support essential
Craig Haggit
Sr. Catalog Librarian
Western History and Genealogy Dept.

khaggit@denverlibrary.org
Hello everyone, my name is Stacey Erdman, and I recently started a new position as the Digital Preservation & Curation Office for Arizona State University Libraries. This is actually why I’m not able to join you in person today, because I just started this job last week!

Before I joined ASU, I was the Digital Archivist at Beloit College and, before that, I was the Digital Collections Curator at Northern Illinois University Libraries. NIU is also where I got my start with digital preservation work.

Since 2012, I have been part of the team that has collaboratively led the Digital POWRR Project. Digital POWRR is an education and advocacy group, funded by federal grants, that puts on practical digital preservation training events around the country. I now serve as the Communications and Communities Coordinator for POWRR and as a Consulting Instructor.

My role on the panel here today is to provide the consultant experience and to talk about the process of conducting a digital preservation assessment.
Resources

https://www.nedcc.org/publications
https://www.nedcc.org/publications
I'm Gonna Live Forever: Assessing the preservation of digital collections

June 22, 2019  #alctsAC19  #ALAAC19
Peer Assessment Facets

- The Organization
- Staff and Resources
- Policy Infrastructure
- Processes and Workflow
- Technological Resources
## Recommendations

### What is it?
- Suggestions for improvement
- Not prioritized
- Not comprehensive

### Example:
- Mission Recommendation bank
  - Create a mission statement for the organization and write it down
  - Include preservation, and specifically digital preservation, in mission
  - Digital preservation goals and activities are aligned with mission
  - ... etc.
Lightning Fast Peer Assessment Practice

Discussion prompt: What digital collections are held by the institution?
How could I use these resources?

- Assess internally, individually or with a group
- Assess with another institution
- Consult using the framework
- Host a Peer Assessment Workshop
Q & A

- **Ann Marie Willer** – Director of Preservation Services, NEDCC
- **Annie Peterson** – Program Leader, LYRASIS
- **Craig Haggit** – Sr. Catalog Librarian, Western History and Genealogy Department, Denver Public Library
- **Stacey Erdman** – Digital Preservation & Curation Officer, Arizona State University Libraries
Thank you for attending this ALCTS program

Your feedback is important to us!

Please take a moment to complete a short online evaluation form at the URL below:

https://www.surveymonkey.com/r/DGX6QVK
Conducting a Digital Preservation Assessment

Stacey Erdman
Digital Preservation & Curation Officer
Arizona State University Library
Joining the DAT Cohort

• The application process
• Spurred by interest in assessment and consulting work
• On-site training gave us practice interviewing, and a "community of practice" to engage with
Site Selection

- Received input from NEDCC staff, WiLS, & my supervisor on possibilities
- All 3 suggested Ripon!

At a glance...

- Small liberal arts college
- Ripon, WI, pop. 7783
- Founded in 1851
- Around 800 students – majority from WI
- Member of Associated Colleges of Midwest
- Library has 3 librarians, 1 support staff
Site Visit Preparations

• Sent questionnaire to site contact & reviewed results
• Set schedule for the day
• Basic research on people I would be meeting with
• Sent one-pager
• Wrote list of questions for each meeting, tailored to each person based on the Framework document
The Site Visit – September 11, 2018

I talked.....all....day....long.

Meetings with....
- Library staff
- IT staff
- Communications staff
- Admin

+ Lunch; coffee breaks; tours of library, smart classroom, gallery, campus

Felt like a combo of selling Girl Scout cookies & a job interview??
Writing the Report
Thanks!

stacey.erdman@asu.edu

@digitalPOWRR

http://digitalpowrr.niu.edu
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