



## Demystifying Digitization:



Planning a Digitization Project Project from Start to Finish

#### **An Introduction to California Revealed**

Thursday, June 29th, 2023 12pm - 1:30pm











# Webinar Agenda

- ♦ Welcome + Introductions
- Brief History of California Revealed
- Why digitize?
- Inventory + Assess
- ♦ Prioritize + Select

- Describe + Generate Metadata
- Prepare for Digitization
- Digitization Standards: Capture + Evaluate
- Preservation + Access
- **♦** Q & A



California Revealed is an initiative of the

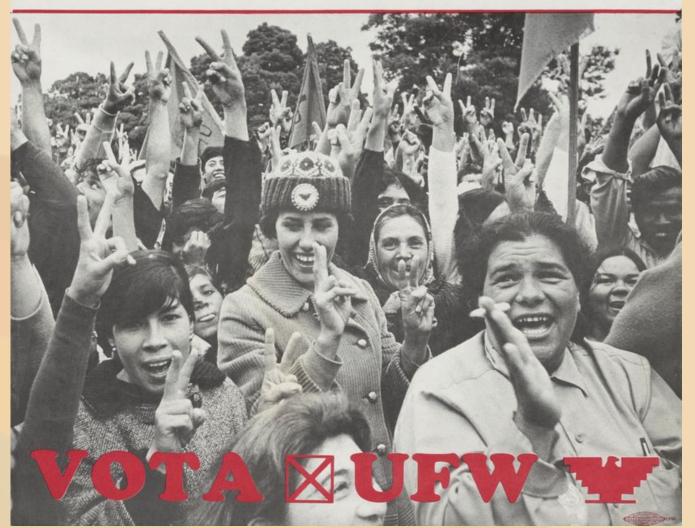
California State Library that helps public

libraries, archives, museums, historical
societies, and other heritage groups digitize,
preserve, and provide online access to
materials documenting the state's history, art,
and cultures.









Ahora Es Cuando, 1976/1977~
Center for the Study of Political Graphics

## Our Team



**Director** Pamela Vadakan

Outreach Coordinator
Guadalupe Martinez

Audiovisual Digitization + Preservation
Shahed Dowlatshahi - Manager
Willow Germs - Assistant
Alyse Hebert - Intern

Print Digitization + Preservation
Liz Seeley - Manager
StarRose Keyes-Lebergott - Assistant

**Digital Preservation + Repository**Megan Lohnash - Manager
Natalie Martinez - Assistant

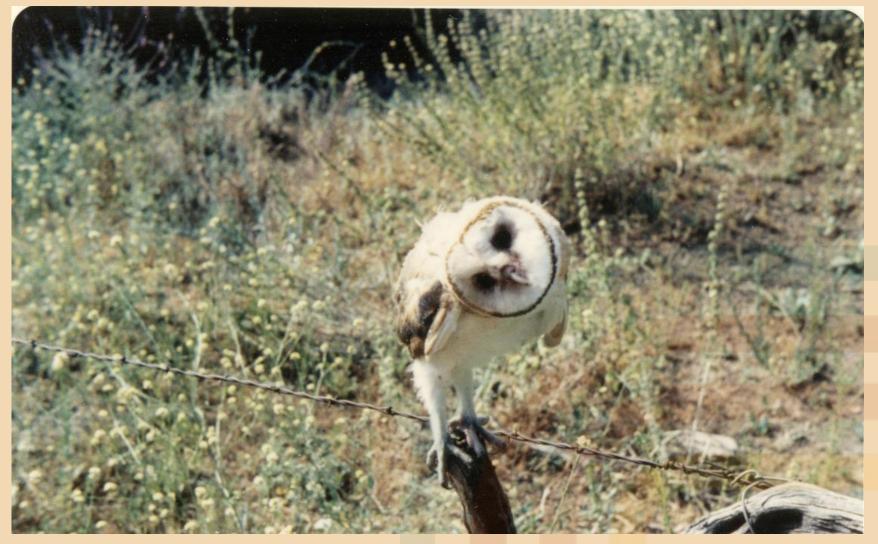
# Opportunities to Participate

## Digitization and Preservation Assistance

Description Assistance: Cataloging California

Memory Lab Training

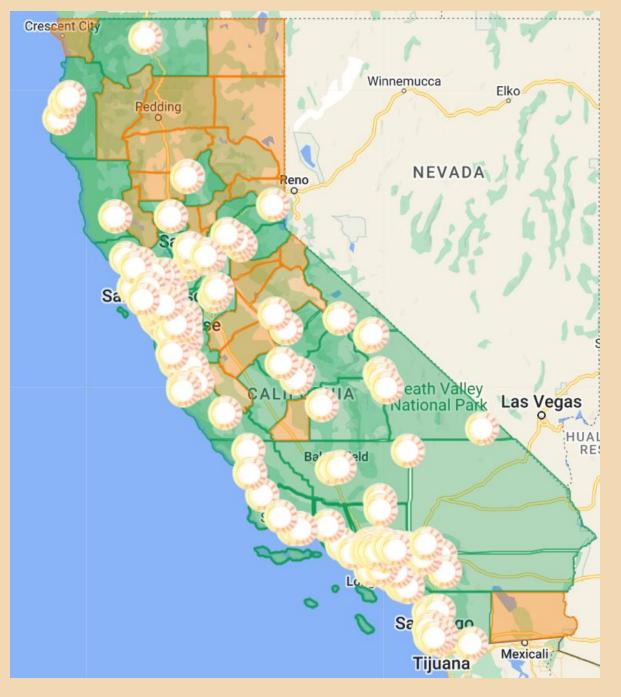
**Community Archiving Workshops** 



Barn owl raised in Topanga, California, 1960 LA County Library

# Participating Organizations

#### 400+ partners across the state!



- African American Museum and Library
- Autry Museum of the American West
- The Bancroft Library, UC Berkeley
- Bishop Chamber of Commerce
- Butte County Library
- California Academy of Sciences
- California Historical Society
- California State University,
   Sacramento
- Center for Asian American Media
- Center for Sacramento History
- Daly City Public Library
- Dixon Public Library
- East Bakersfield High School
- Eastern California Museum
- Fresno County Public Library
- Glendale Library
- Graduate Theological Union
- Headlands Center for the Arts

- Inyo County Free Library
- Kern County Library
- Labor Archives, SF State
   University
- Madera County Library,
   California History and Family
   Research Room
- Manzanar National Historic Site
- Napa County Historical Society
- Oakland History Room
- ONE National Gay & Lesbian Archives
- Pacifica Radio Archives
- San Diego Air and Space Museum
- Shoshone Museum
- UCLA, Ethnomusicology Archive
- Upland Public Library
- Whittier Museum
- Yolo County Archives
- YOU!

Hawksworth Home Movie, 1951 Madera County Library

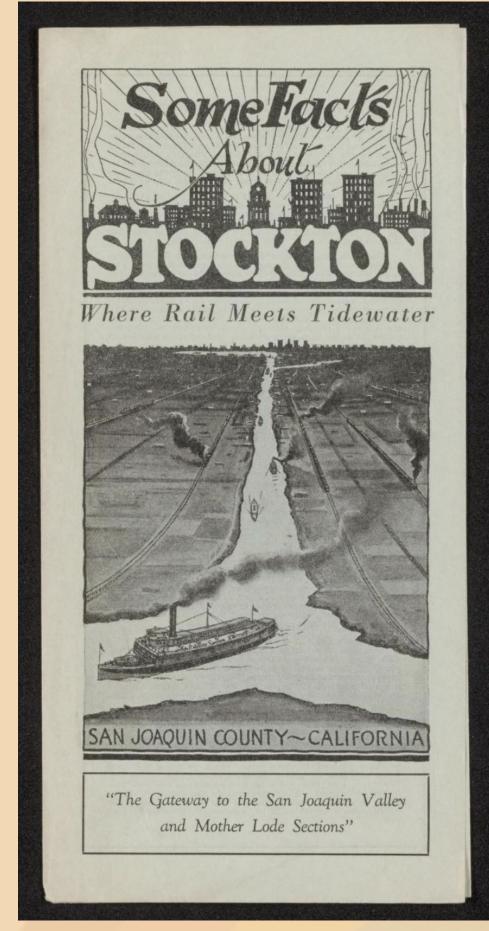
## Why digitize?

- Access
  - Connect communities to local history
  - Provide researchers with online access
  - Publicize your organization's collections
  - Identify and describe your collections

Hawksworth Home Movie, 1951 Madera County Library

## Why digitize?

- Access
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  - Provide researchers with online access
  - Publicize your organization's collections
  - Identify and describe your collections
- Preservation
  - Opportunity to assess your collection
  - Preserve fragile or deteriorating materials
  - Address obsolescence (esp. magnetic media crisis)
  - Minimize risks of environmental threats and disasters
  - Provide long-term access



Some Facts About Stockton, 1922 UC Davis Library, Special Collections

# Planning for a digitization project...

- Assess the overall state of your collection
- Identify materials
- Set digitization standards
- Determine digitization workflow, equipment, software, roles
- Set quality control standards
- Plan for long-term storage + digital preservation
- Plan for how the digitized materials will be accessed

## Digitization Steps



**Inventory + Assess** 



**Prioritize + Select** 



Describe + Generate Metadata



**Prepare for Digitization** 



Digitization Standards: Capture + Evaluate



**Digital Access + Preservation** 

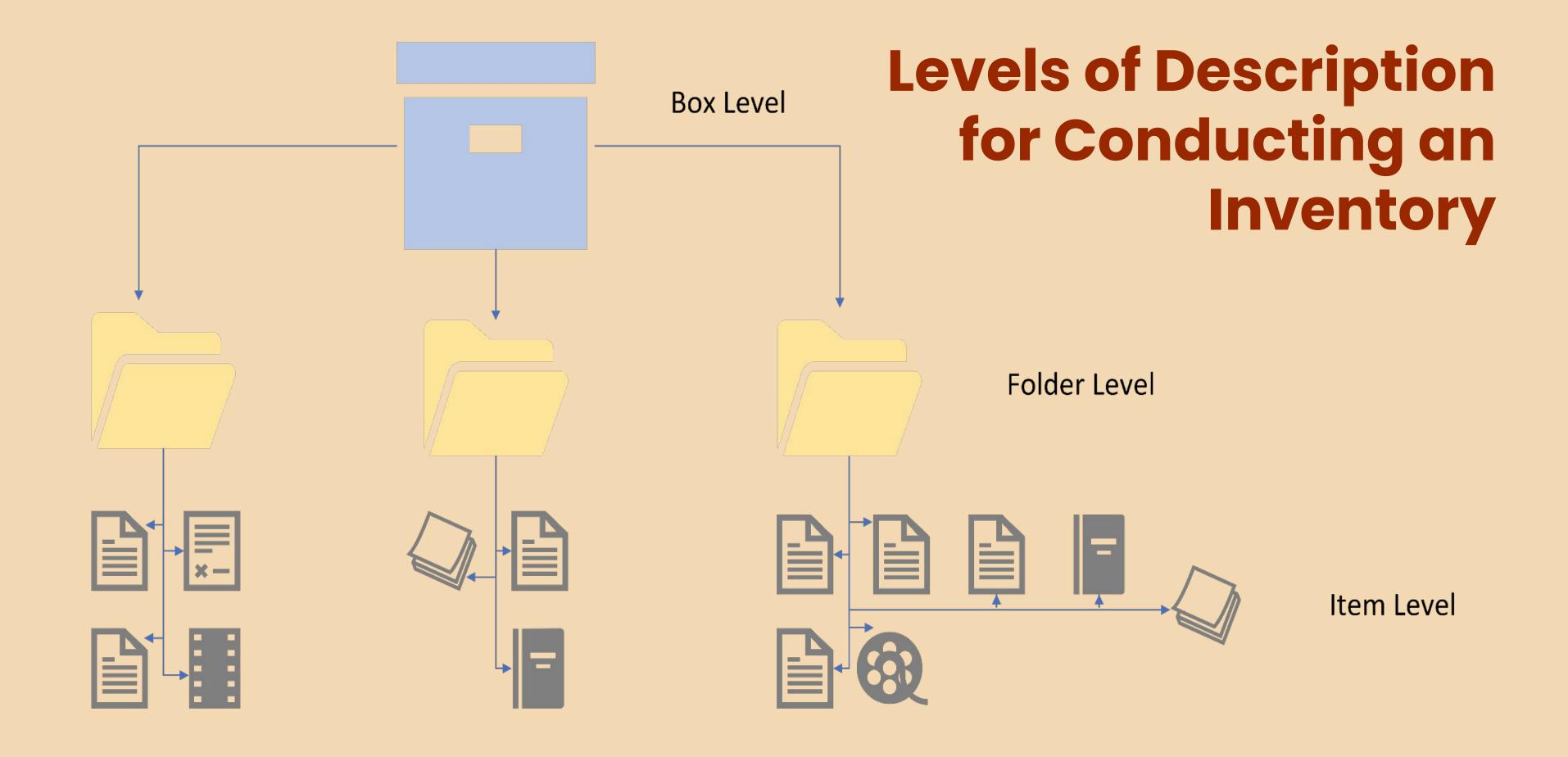


University of Texas Library Storage Facility, Austin, TX

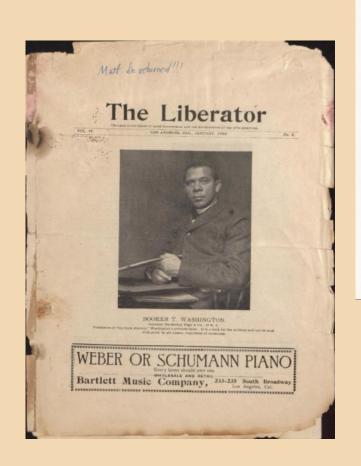
## Inventory + Assess

What do you have and where is it stored?

- Conduct a physical inventory of your materials to identify content for digitization
  - Go into the stacks, open boxes, and confirm what's there!
- Use information gathered to set priorities
- Use your inventory to create initial descriptions (metadata) of the materials
  - Inventory can be used to create or update a finding aid or catalog records and for preservation planning, including digitization



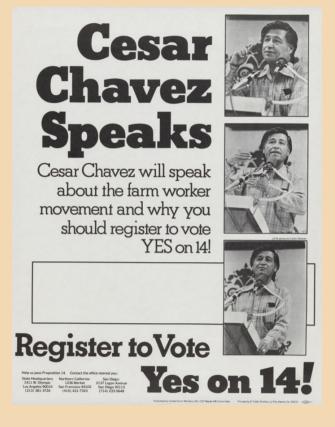
## Inventory + Assess: Format Identification

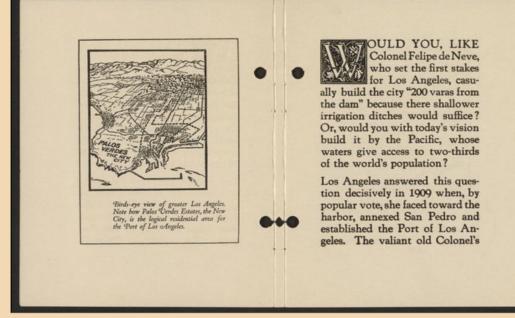












































## Why take the time to inventory?



Jimmie Barroga and Gabriel Madriga, 1931 Center for Asian American Media

- Inventorying is a first step in planning for current and future storage and preservation needs
- Effective planning depends on knowing the extent and condition of your collection
  - If you don't know what you have, and where it is, you won't be able to care for it, advocate for it, and fundraise
- The description of your physical collection will be the basis of the description for your digital collection

## Digitization Steps



**Inventory + Assess** 



**Prioritize + Select** 



Describe + Generate Metadata



**Prepare for Digitization** 



Digitization Standards: Capture + Evaluate



**Digital Access + Preservation** 

### **Prioritize + Select**



### **Consider Preservation**

Is the object at-risk?

- Archival: unique, original, master, rare, or "best available"?
- Obsolete format?
- Damaged or deteriorating?
- At-risk if use continues?
- At-risk if disaster strikes?
- For example, magnetic media, such as cassette tapes, are quickly deteriorating

### **Prioritize + Select**



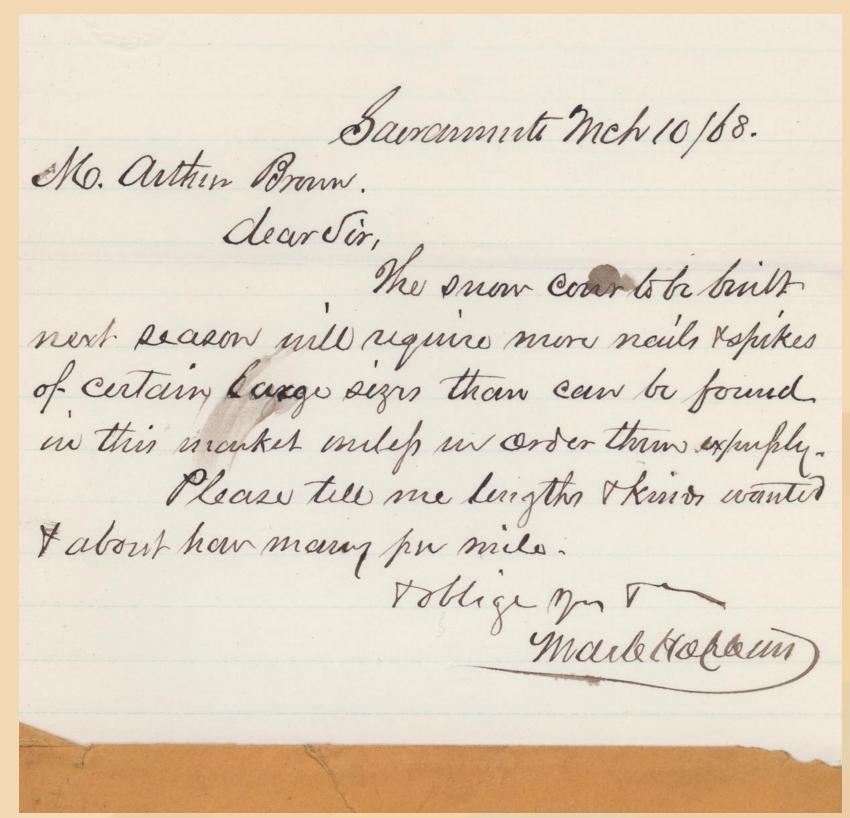
https://californiarevealed.org/islandora/object/cavpp%3A35307

#### **Consider Presentation**

Would the object lend itself well to digitization?

- Able to be viewed by the public?
- Underutilized or underrepresented?
- Limited due to institutional factors?
- Limited due to format?
  - e.g. audiovisual, oversized, film negatives, slides

## **Prioritize + Select**



## Consider Use

Will people use the object? Is the object "important"?

- Historically significant?
- Requested by users?
- Part of a comprehensive collection?
- If damaged or lost, would you spend resources to replace it?
- Non-commercial or out of copyright?
- Your responsibility?

## Digitization Steps



Inventory + Assess



**Prioritize + Select** 



Describe + Generate Metadata



**Prepare for Digitization** 



Digitization Standards: Capture + Evaluate



**Digital Access + Preservation** 

#### **Metadata Records**

- Metadata is structured, digital information that describes the nature of something
- Item-level description is ideal
  - This improves accessibility, usability, discoverability, etc.
- A metadata record connects a
   physical object to its digital
   object (.xml record)



https://californiarevealed.org/islandora/object/cavpp%3A79030

#### DATA ABOUT DATA

## Types of Metadata in Digitization

## Descriptive

Enables *identification* and *discovery* of resources, such as title, creator, content, subjects, etc.

#### Technical

Includes *properties of a digital file*, such as **format**, **size**, and the **hardware** and **software involved** in the creation and/or maintenance of the file

### Administrative

Relates to the *management of resources*, such as **storage location**, current **workflow** states, **preservation information**, etc.

# REQUIRED METADATA FIELDS

- Institution
- → Title
- Partner-supplied ID
- Created Date
- Creator(s)
- Significance/Priority
- Description

- Condition
- Media Type
- Format
- **Extent**
- Dimensions (Size)\*
- Duration (Runtime)\*\*
- Copyright Statement

# RECOMMENDED METADATA FIELDS

- Generation
- Subject Topics
- Subject Entities
- Spatial Coverage
- Temporal Coverage
- Genre (AV only)

- Language
- Country of Creation
- Transcript
- Item Annotations
- Partner Administrative Notes



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## Metadata Records: Spreadsheet to Publication

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Institution* (1.1)	11000H - 3000H				Creators* (1.5)	Significance * (1.6)	Description* (1.7)	Condition* (1.8)	Condition Notes*
(Field will be viewable to public once published)	A formal or supplied title that will be used to identify and describe the resource.	of a Call Number or Temporary	A unique identifier, in the form of a Call Number or Temporary Identifier, is required to distinguish your items in our system. Do not use the same Temporary Identifier for multiple entries. If you provide a Temporary Identifier, you do not need to provide a Call Number. (Field will NOT be viewable to the public)	Date of the resource's creation.	A person, family, or group responsible for, or involved in, the creation of the material, such as the author or photographer.	A statement regarding the significance of the resource to California and/or local history. Justify why the object should be preserved and made accessible for future generations.  (Field will NOT be viewable to the public)	Summary about the intellectual content of the resource, including any contextual information necessary to understand the importance of the object from a research perspective.	One-word classification of the material's physical condition. (Field will NOT be viewable to the public)	n. state of the materia damage, deteriorati
Format in the same way as it appears in your California Revealed partner profile. If this is your first time applying, please format according to your organization's	be consistently formatted in relation to the naming conventions used for other items in the submission. For	your Institution to identify the	To create a Temporary ID, use a simple convention such as one word followed by an underscore and sequential numbers.  Only include one Temporary Identifier per entry.	For approximate dates, use ~ at the end, e.g. YYYY~  For uncertain, assumed, or inferred dates, use ? At the end,	[Last Name], [First Name] [Organization Name]	Write in complete sentences.  Keep explanation brief.  The information you enter into this field can be copied into the Description (1.7) field so that the information		Controlled Vocabulary. Choose from dropdown menu: Excellent; Good; Fair; Poor; Unknown	
Examples:  Bishop Chamber of Commerce and Visitor Center  California State Library	Examples:  California Daily Herald 1930-05-03  Damaged train at Donner Pass  Emma and Gail Patterson in Big Sur  Emma and Gail Patterson in San Luis Obispo	Examples: 001.004.129 200.109.120 320-104-928	chi-03-001 chi-03-002 BigSur_001 BigSur_002 BigSur_003	Examples:  1976-07-04  1976-07 (reads as July 1976)  199X (reads as 1990s)  19XX? (reads as 20th century?)  XXXX (date is unknown)	Roman Elliot	Example:  The Walnut Creek Art Teachers Newsletter documents the development of art education in the East Bay from 1925 to 1980. The issues are deteriorating, and this collection is the only known set of copies.	Example:  This photograph depicts siblings Bob and Sally Jenkins at Lake Tahoe in the summer of 1948. Bob smiles at the camera while Sally plays with a wooden horse. The children's parents, John and Patricia Jenkins, were early childhood educators and used the photo in a book discussing the importance of outdoor education.	Examples: Excellent Poor Unknown	Brittle paper with o weak. Okay
	Schoolhouse Peak Lookout, repeater, power line and radio pole, 1950	BC-II-3149		1950-07	Siler, William		This photograph of the Schoolhouse Peak Lookout in Humboldt County, California and the adjacent radio repeater, power line and radio pole was taken in July 1950 by William Siler. This photograph of the Schoolhouse Peak Lookout in Humboldt	y Good	
9 Cal Fire Museum	Schoolhouse Peak Lookout, Humboldt, 1950	BC-II-3150		1950-07	Siler, William	The "Black Cards" collection of California Division of Fore	re This photograph of the Schoolhouse Peak lookout in Humboldt County, California wa	Good	
O Cal Fire Museum V	Wilbur Springs 4-man fire station, 1954	BC-II-3152		1954-11	Reath, Don C.	The "Black Cards" collection of California Division of Fore	The Wilbur Springs Fire Station of the California Division of Forestry in Lake Count	Good	
Cal Fire Museum V	Wilbur Springs 4-man fire station side view, 1954	BC-II-3153		1954-11	Reath, Don C.	The "Black Cards" collection of California Division of Fore	This photograph is a side view of the Wilbur Springs Fire Station of the California D	Good	
The state of the s	Ukiah barracks and messhall, California Division of Forestry, 1954	BC-II-3155		1954-11	Reath, Don C.	The "Black Cards" collection of California Division of Fore	This is a photograph of the barracks and messhall at the California Division of Fores	Good	
	Ukiah equipment building, California Division of Forestry, 1954	BC-II-3156		1954-11	Reath, Don C.	The "Black Cards" collection of California Division of Fore	re This is a photograph of the equipment building at the California Division of Forestry	Good	
4 Cal Fire Museum	Charles W. Fairbank, Deputy State Forester	BC-II-3157		1959	California Division of Forestry	The "Black Cards" collection of California Division of Fore	This photograph is a portrait of Charles W. Fairbank while he was Deputy State For	Good	
	California Youth Authority work at Byers Ranch, No. 1104	BC-II-3162		1948-09-30	Kaufner, H.	The "Black Cards" collection of California Division of Fore	This photograph shows California Youth Authority workers from Byers Ranch doing	Good	
	California Youth Authority work at Byers Ranch, No. 1106	BC-II-3163		1948-09-30	Kaufner, H.	The "Black Cards" collection of California Division of Fore	re This photograph shows California Youth Authority crew members from Byers Ranc	Good	
	California Youth Authority camp at Whitmore, logging truck and burner	BC-II-3165		1948-12-01	Kaufner, H.	The "Black Cards" collection of California Division of Fore	re A photograph of the logging truck and burner used at Whitmore California Youth Auth	Good	
	California Youth Authority camp at Whitmore, shower								
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## Metadata Records: Spreadsheet to Publication

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Cal F Mus	seum	Schoolhouse Peak Lookout, repeater, power line and radio pole, 1950	BC-II-3149	1950-07	Siler, William	Division of Forestry records housed at the Cal Fire Museum was created by Division of Forestry photographers who were tasked with documenting facilities and activities for the Division's internal records. The collection documents early fire control and lookout facilities, fire control activities and wildfire prevention efforts by the California State Division of Forestry in the 1940s to 1960s. Some facilities still exist. Others have been rebuilt or remodeled at or near the original site. The collection provides a snapshot in time of early state fire and forestry activities, and has been used in assessing the historic potential of some buildings and facilities still in use. The California Division of Forestry eventually became the Department	California Division of Forestry records housed at the Cal Fire Museum. The collection was created by Division of Forestry photographers who were tasked	Good	Still Image	Card	1	Page	9	5.25	in	Public Domain. No restrictions on use.





















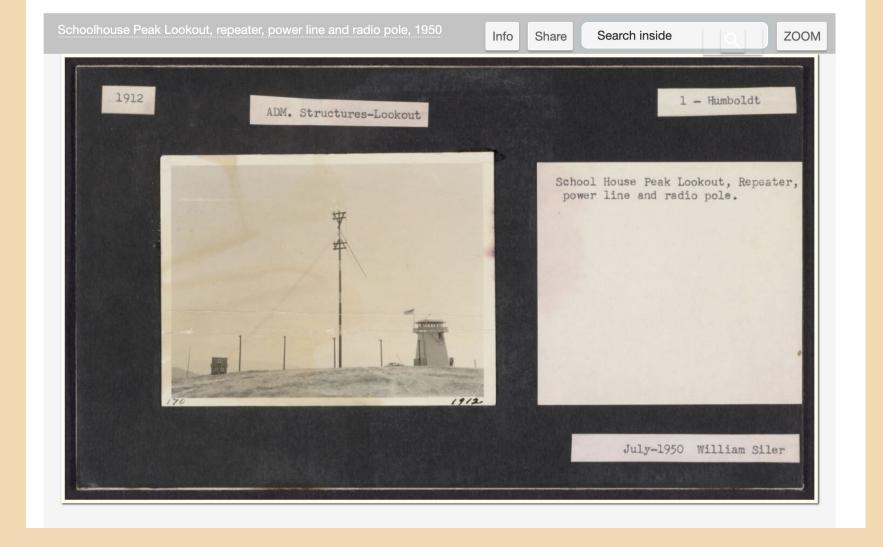






## Metadata Records: Spreadsheet to Publication

Schoolhouse Peak Lookout, repeater, power line and radio pole, 1950



Metadata	
Title	Schoolhouse Peak Lookout, repeater, power line and radio pole, 1950
Series Title	Black Card Photos
Date Created	July 1950
Description	This photograph of the Schoolhouse Peak Lookout in Humboldt County, California and the adjacent radio repeater, power line and radio pole was taken in July 1950 by William Siler. The photograph is from the "Black Cards" collection of California Division of Forestry records housed at the Cal Fire Museum. The collection was created by Division of Forestry photographers who were tasked with documenting facilities and activities for the Division's internal records. The collection documents early fire control and lookout facilities, fire control activities and wildfire prevention efforts by the California State Division of Forestry in the 1940s to 1960s. Some facilities still exist. Others have been rebuilt or remodeled at or near the original site. The collection provides a snapshot in time of early state fire and forestry activities, and has been used in assessing the historic potential of some buildings and facilities still in use. The California Division of Forestry eventually became the Department of Forestry and Fire Protection, and has been known as CalFIRE since 2006.
Creators and Contributors	Creator: Siler, William
Subject Topic	Fire lookouts
Subject Entity	California. Division of Forestry
Place(s)	Humboldt County (Calif.)
Language	English
Media type	Text
Format	Card
Extent	1 Page
Dimensions	9 x 5.25 in
Generation	Original
Copyright Statement	Public Domain. No restrictions on use.
Country of Creation	United States
Source Institution	Cal Fire Museum
Link to Internet Archive	https://archive.org/details/casbcfm_000142



#### 2021/2022 Metadata Guidelines for Still Image and Text Objects

#### Robust metadata promotes wide discovery of your materials and helps create connections between collections.

California Revealed (CA-R) is an online repository of digitized materials, and we require accurate and consistent item-level description—called metadata— for each object submitted for digitization. Taking the time to create consistent, properly formatted, and well-described metadata records will ensure that your items are processed efficiently and accurately during every step of the CA-R digitization process. After digitization and publication, item-level metadata serves as the primary point of reference for members of the public to discover, access, and use your digitized collection materials on the <u>CA-R website</u>.

These guidelines will help you prepare your metadata records for submission to the CA-R Repository. Please contact us at <a href="mailto:team@californiarevealed.org">team@californiarevealed.org</a> with any questions, or if you would like to set up a training. The CA-R team will reach out to Partners to provide us with additional metadata if the original submission is insufficient. If you have any questions, please reach out - we are here to help!

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# Metadata Standards for Digitization with California Revealed

- As part of your application, CA-R requires metadata records for the items you wish to digitize
  - Must submit using CA-R's
     Nominations Spreadsheet
- Metadata records must follow CA-R's Metadata Guidelines
  - Outlines specific formatting needs
  - Offers guidance regarding the creation of titles, descriptions, and other free text fields

## Digitization Steps



Inventory + Assess



**Prioritize + Select** 



Describe + Generate Metadata



**Prepare for Digitization** 



Digitization Standards: Capture + Evaluate



**Digital Access + Preservation** 

## Prepare for Digitization

- Pull selected items from their storage area
- Review the materials against their metadata records
- Identify and record specific digitization and/or special handling instructions
- Remove rubber bands, staples, clips, binders, fasteners, plastic bags, etc.
- Remove materials from mylar sleeves and folder them
- Tape down ends of open reels
- Arrange and clearly label materials to reflect the order you expect them digitized





# When materials arrive at California Revealed...

- Confirm delivery, then conduct an inventory of the shipment to make sure all objects are accounted for and have arrived safely
- Collection materials are processed for digitization separately through our Audiovisual, Print, and Digital "streams"
  - Audiovisual materials are shipped to an outside vendor for digitization
  - Print materials are either captured onsite or sent to a vendor
  - Digital materials are "captured" onsite

## Digitization Steps



Inventory + Assess



**Prioritize + Select** 



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**Prepare for Digitization** 



Digitization Standards: Capture + Evaluate



**Digital Access + Preservation** 

## Digitization Standards: Create a Project Plan

#### **Capture workflow**

Specify how the materials will be captured: equipment used, capture style

#### **Final deliverables**

Files created for each object: Preservation and access files, XML metadata files, checksums Technical specifications for the files: File type, image/sound quality, color vs. greyscale, etc.

#### File naming conventions

Be consistent and use unique identifiers Example: YYYYMMDD\_seriestitle\_######

#### Metadata + metadata standard(s)

Information about the files: descriptive, technical, administrative, preservation Map to a standard XML schema such as DublinCore or PBCore

#### **Data storage**

Estimate how much storage you'll need Specify the type of storage media you want the files delivered on

#### **Quality Control**

Who will check the files and to what extent

Cost Timeline Roles

## Digitization Standards: In-house or Outsource?

#### In-house Challenges:

- Initial costs
- Requires staff

#### In-house Advantages:

- Total control of the process
  - Develop new skills

#### **Outsource Challenges:**

Loss of control

#### **Outsource Advantages:**

- Less investment of resources (equipment and staff)
  - Potentially a lab can handle majority of formats
    - Bulk rate option

























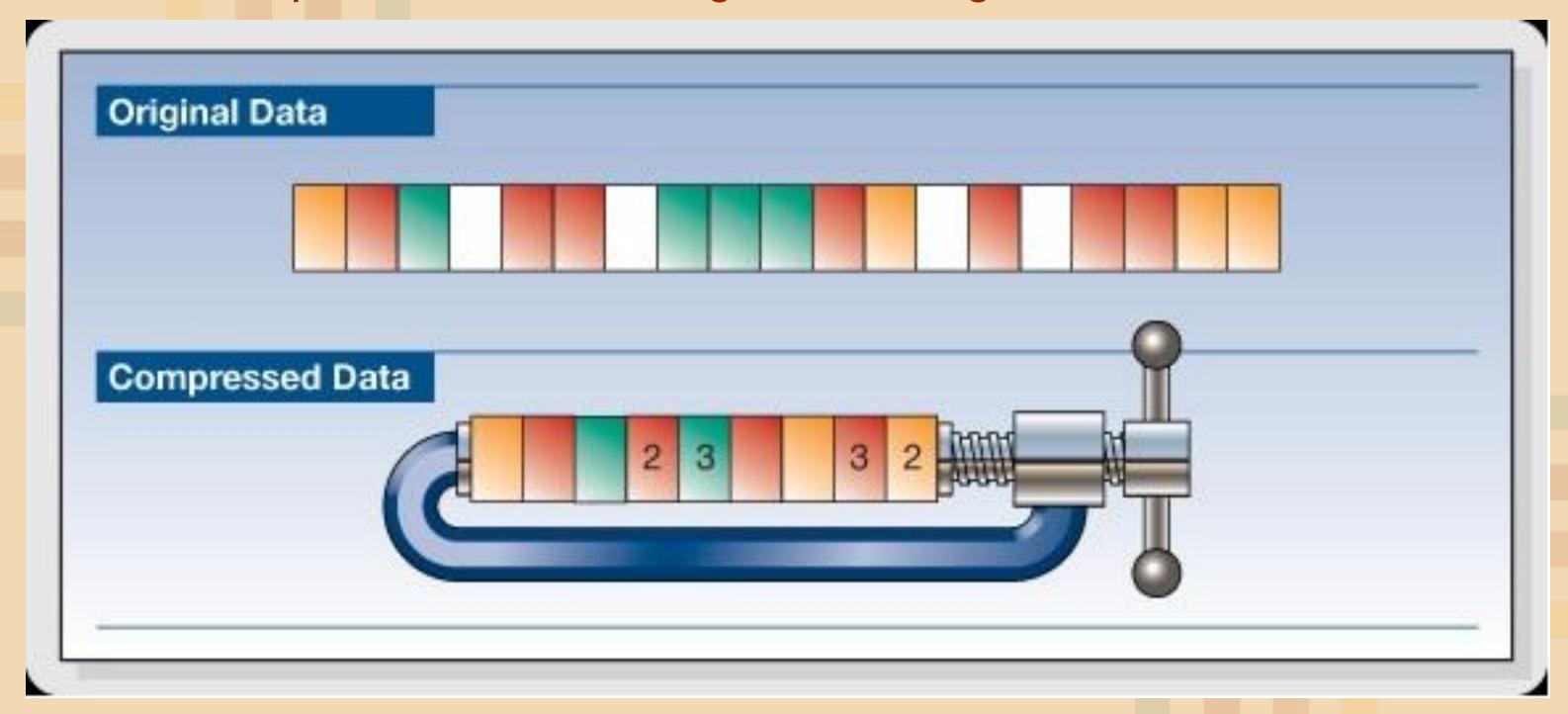


## Digitization Standards: Capture Equipment

- Moving images
  - Playback equipment
  - AD converter (hardware + software)
  - TBC (time-based corrector)
- Sound recordings
  - Playback equipment
  - AD converter (hardware + software)
- Print (text and still image) materials
  - Digital camera + copy stand
  - Specialized film scanners for microfilm, photographic negatives, and slides
  - Photo editing software
- Born-digital materials
  - Digital converters (hardware + software)



**Preservation** = file containing the original, highest quality version of the data, <u>uncompressed</u>; used for long-term storage



**Access** = file containing the same "information", but a smaller amount of data, <u>compressed</u>; used for streaming, circulating

## Digitization Standards: Audiovisual

Moving image formats such as: VHS, Betacam, ¾" U-matic, 16mm film, MiniDV, DVD, etc.

Preservation = <u>uncompressed</u>; long-term storage

Digital File Type = .mov

Access = <u>compressed</u>; streaming, circulating Digital File Type = .mp4

## Digitization Standards: Audiovisual

Audio formats such as: audiocassette, ¼" open reel, DAT, CD, etc.

Preservation = <u>uncompressed</u>; long-term storage Digital File Type = **.Wav** 

Access = <u>compressed</u>; streaming, circulating

Digital File Type = .mp3

## Digitization Standards: Print

Print (still image and text) formats such as: books, pamphlets, slides, photographs, scrapbooks, etc.

Preservation = <u>uncompressed</u>; long-term storage Digital File Type = .tif

Access = <u>compressed</u>; streaming, circulating
Digital File Types = .pdf, .jpg

# Digitization Standards: Digital

**Born-digital formats** such as: files created and/or stored on a phone or computer, photos + videos taken using a digital camera or smartphone, emails, websites, etc.

Preservation = <u>uncompressed</u>; long-term storage Ideal Digital File Types = .mov, .wav, .tif

Access = <u>compressed</u>; streaming, circulating

Digital File Types = .mp4, .mp3, .pdf, .jpg

# Evaluating Digitization Standards: Quality Control (QC)

#### What are the goals of Quality Control (QC)?

- Technical specifications are correct
  - Digital file formats, # of copies, naming conventions
- Digital copy is true to the original: vendor didn't introduce any errors
  - Refer to condition notes gathered during the inventory process
- Add, correct, and enhance descriptive metadata
- Add, correct, and enhance technical metadata
- Wrap up loose ends in administrative notes





























# Digitization Steps



Inventory + Assess



**Prioritize + Select** 



Describe + Generate Metadata



**Prepare for Digitization** 



Digitization Standards: Capture + Evaluate

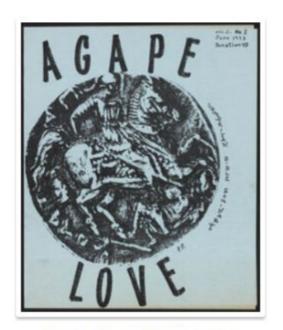


**Digital Access + Preservation** 



#### **FEATURED ITEMS**

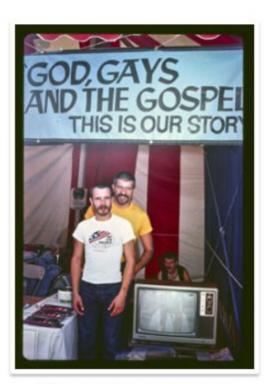




Agape/Love Newsletter



Imperial Court of Orange County coronation



Bill and Tom in front of

### Your collections don't stop at California Revealed...

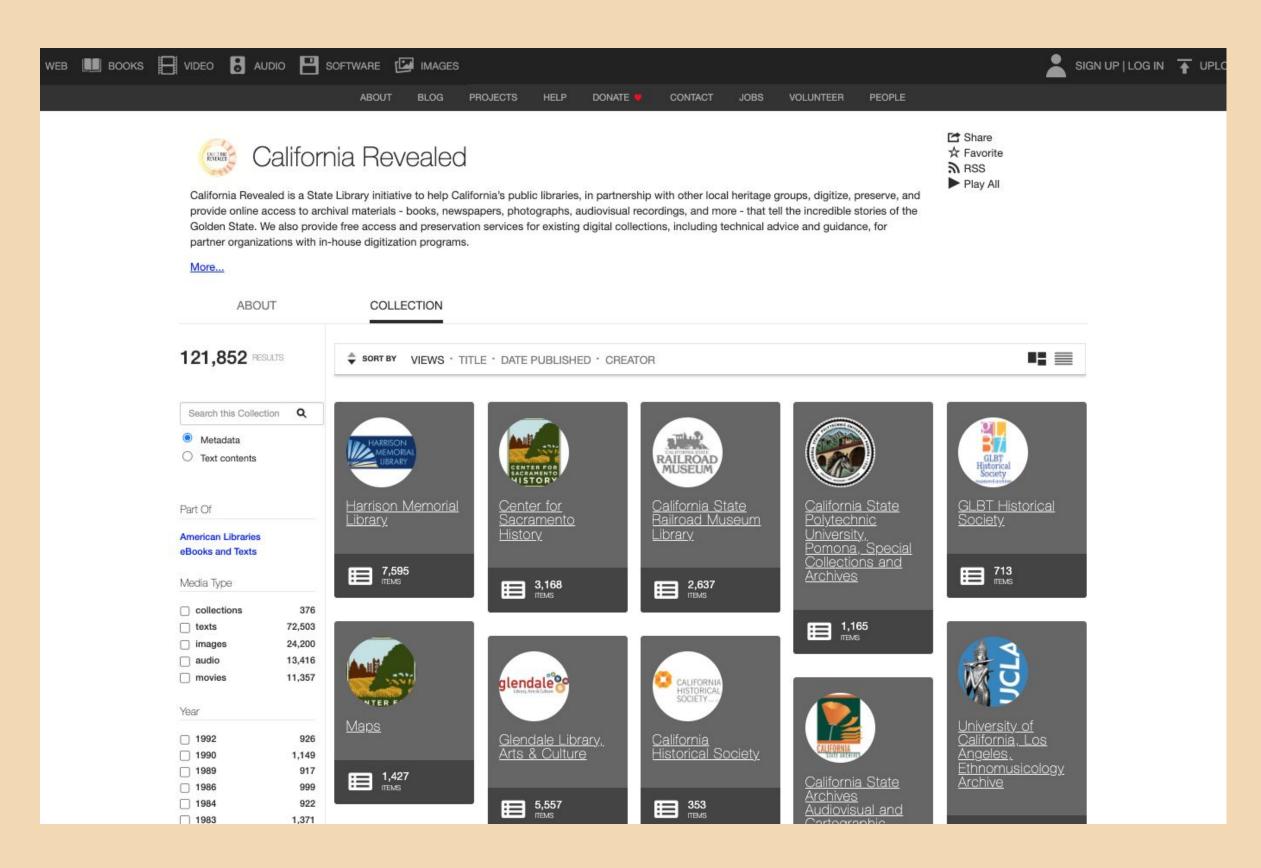












# How do you ensure long-term access?

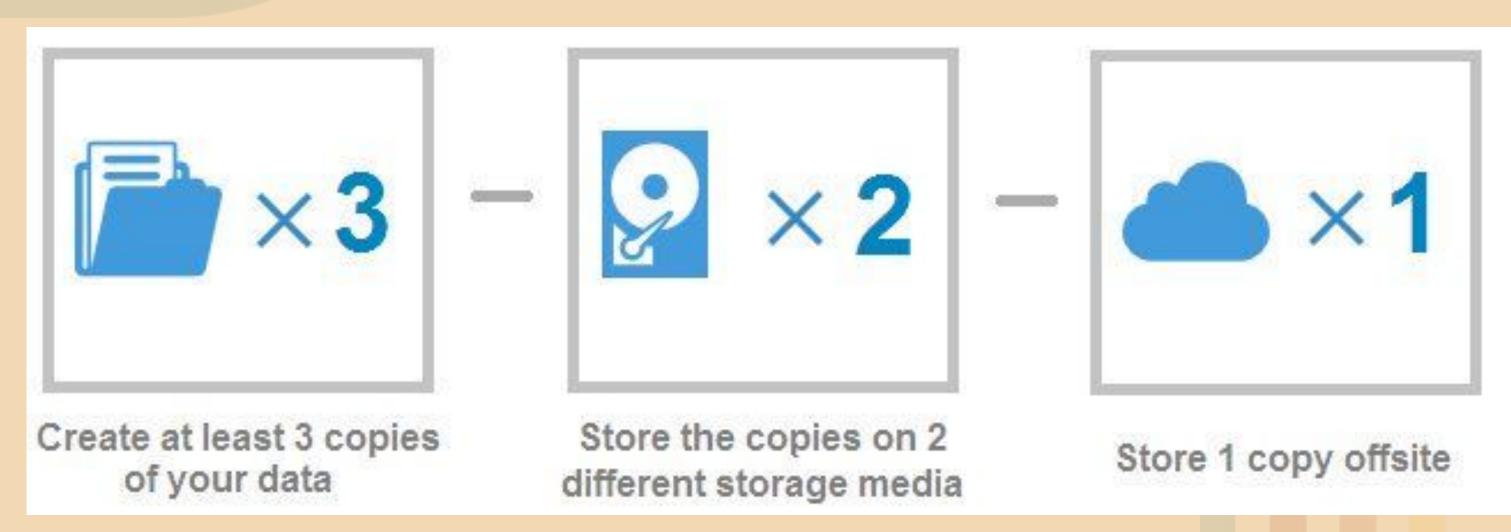


# Create a Digital Preservation Plan

- LOCKSS (Lots of copies keeps stuff safe)
- NDSA Levels of Preservation
- Digital Readiness Levels

Remember:

3-2-1!



Permalink: <a href="https://recollectionwisconsin.org/toolkit/storage">https://recollectionwisconsin.org/toolkit/storage</a>

### Your Digital Preservation Plan

- Order and store files on hard drives (avoid DVDs and CDs)
- Clearly label and organize hard drives
- Duplicate the files on a second drive and/or upload to the cloud
- Consult with IT dept (if available) about server storage
- Check files at least once a year to make sure hard drives are okay

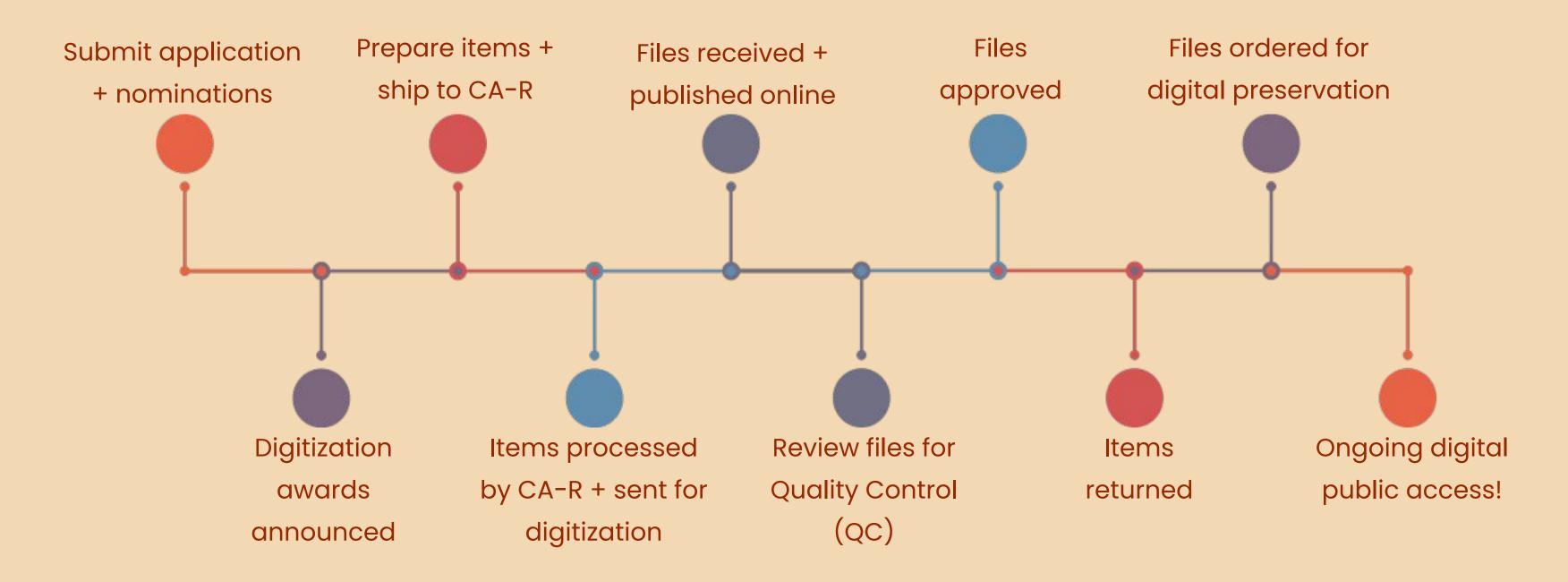
Digital Readiness Toolkit: recollectionwisconsin.org/digital-readiness-toolkit

# CA-R's Digital Preservation Plan

- Write to LTO data tape and store in 2 different geographic
  - locations to mitigate risk of loss
  - Preservation copy
  - Access copy
  - MD5s
  - XML
- Internet Archive
  - Access copy + MD5s + XML
- Amazon S3 for californiarevealed.org
  - Access copy + MD5s + XML
- Annual integrity checks on files on all files



# Digitization & Preservation Assistance Program Timeline



Applications Due Friday, July 28, 2023

Application Form:
https://tinyurl.com/2023CRdigitize-preserve
Nominations Spreadsheet:
https://tinyurl.com/2023CRnoms-form



# Keep in Touch!

# Guadalupe Martinez Outreach Coordinator

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# A C S A



Daisy Joe Fung, 1920, Tulare County Library

What steps were you most interested in learning about or reviewing?

Do you feel more confident to start a digitization project?

Do you feel prepared to collaborate with California Revealed?

What challenges do you foresee in doing digitization, digital preservation, and access projects?

Reflections on any part of the webinar are welcome at this time!