Demystifying Digitization
Thursday, May 30, 2024
Zoom Webinar

**This webinar will be recorded**
Workshop Agenda

Welcome
Why digitize?
Inventory and Assessment
Prioritize and Select
Generate Metadata

Prepare for Digitization
Digitization Standards
Preservation and Access
California Revealed Programs
Questions and Reflections
Evaluations
Who We Are

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.

Balboa Park water lilies (1977)
California State University, San Marcos
California Revealed Team

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425+ Partners and 138,000+ Items

- BAYMEC Community Foundation
- Berkeley Architectural Heritage Association
- Chinese Historical Society of Southern California
- Commons Archive
- Deserted Films
- Diocese of San Jose
- Emeryville Historical Society
- Holocaust Museum LA
- Imperial County Historical Society
- Johnsville Historical Society
- Kerman Historical Society
- La Peña Cultural Center
- Lodi Historical Society
- Manilatown Heritage Foundation
- Northwestern Pacific Railroad Historical Society
- Open Vallejo
- San Diego Floral Association
- Santa Ana College
- Santa Fe Springs City Library
- St. Vincent's
- Sutter County Museum
- The Working Group
- West Hills College Lemoore
California Revealed Mission and Values

- Strive to engage in memory work that is reparative and reflexive, acting as a bridge between heritage organizations and the communities they serve.

- Expand the historical narrative of California by collaborating with regional organizations – public libraries, archives, museums, historical societies, and community groups – to digitize, preserve, and provide online access to their archival materials.

- Empower communities and individuals within and beyond California to preserve and share their own stories using approachable digital tools and archival practices.
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 (magnetic media crisis)
  - Minimize risks of environmental threats and disasters
  - Provide long-term access
Planning for a digitization project …

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

Some Facts About Stockton (1922)
UC Davis Library, Special Collections
Digitization Steps

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Ahora Es Cuando (1976/1977~)

Center for the Study of Political Graphics
Inventory and 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
LEVELS OF DESCRIPTION FOR CONDUCTING AN INVENTORY

Box Level

Folder Level

Item Level
Inventory and Assess: Format Identification
Why take the time to inventory?

- 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.

Jimmie Barroga and Gabriel Madriga (1931)
Center for Asian American Media
Three-year initiative funded by the State of California to assess emergency preparedness at California organizations that care for cultural and historic resources (e.g., archives, libraries, museums, and tribal nations).

A team of heritage preservation consultants based in California conducts on-site visits for participating organizations and delivers a summary report that documents the organization's current state of emergency preparedness.

Each report includes recommendations for mitigating risks, taking emergency preparedness actions, and completing a disaster plan, thereby providing each with tools to better protect their collections in an emergency, ensuring that California's cultural heritage is preserved into the future.

If you're interested in a free emergency/disaster preparedness assessment via Ready Or Not, there are three ways to contact them: complete their online form, email CAready@nedcc.org, or call 855-501-3020. Anytime: there's no deadline!
California State Library's Groundwork Grants is providing over $1 million in funding to strengthen emergency preparedness for institutions with collections in California.

These grants can support collections care activities including: assistance in the development of disaster plans; disaster recovery & spill kits; preservation supplies; environmental monitoring and alert equipment; staff training opportunities; consultation with local facilities specialists; and supplies, equipment, or hardware for minor, immediate building maintenance, repairs, storage, or security needs.

This is a great opportunity to use “Ready – Or Not” reports to advance preservation and emergency preparedness goals!

The deadline to apply is May 31st.
Learn more at groundworkgrants.org.
Digitization Steps

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Preservation and Access

Marin City Flea Market (1990)
Marin County Free Library
Selection Criteria and Priorities

Consider Preservation

Consider Presentation

Consider Use
Digitization Steps

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What is metadata?

DATA ABOUT DATA

- Metadata is structured information that describes the nature of an object
- Item-level description is ideal to prepare for digitization
  - Why? This improves access, use, discoverability, etc.
- A metadata record connects a physical object to the digital copy
CA-R requires metadata records for the items you wish to digitize.

- 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

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California Revealed can help support cataloging of your collections
Description Assistance: Cataloging California Program

California Revealed helps cultural heritage organizations describe California-related collection materials following CA-R metadata guidelines and inventory spreadsheet.

CatCA Partner Benefits

- $3,000 reimbursement funds for cataloging labor and supplies
- California Revealed Team mentorship upon request
- “Open-door” virtual office hours offered monthly to all catalogers
- 4 scheduled Meet & Greet webinars covering special topics

CatCA Partner Outcomes

- California cultural heritage organizations are provided with the funding and guidance necessary to create item-level metadata records to describe physical and/or digital collections, with the end goal of nominating the materials for next year's Digitization & Preservation Assistance program.

Applications will open Fall 2024 pending budget approval
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Mrs. Masuda packing grapes (1953)
Tulare County Library
Prepare for Digitization

- Pull selected items from their storage area
- Review the materials against their description
- 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
California Revealed Shipment and Processing

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Richard Díaz Collection RDM.009 (Date unknown)
La Raza Historical Society of Santa Clara County
Create a Project Plan

Capture workflow
How the materials will be captured? What equipment will be used?

Final deliverables
What type of files will be created for each object?

File naming conventions
Be consistent and use unique identifiers
Example: YYYYMMDD_seriestitle_######

Metadata and metadata standard(s)
Information about the files: descriptive, technical, administrative, preservation

Data storage
How much storage will you need?
What type of storage media? Hard drive? Cloud?

Quality Control
Who will check digital files for accurate capture? What standards will you use?

Cost
How much to digitize an object? How much to cover the labor?

Roles
Who’s doing the work?
Capture workflow: In-house or Outsource?

In-house Challenges:
- Initial costs
- Requires staff

In-house Advantages:
- Total control of the process
- Develop new skills

First printing press for The Independent newspaper, Nevada City (1978)
Nevada County Library
Capture workflow: 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

First printing press for The Independent newspaper, Nevada City (1978)
Nevada County Library
**Final Deliverables: Files**

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

**Access** = file containing the same “information”, but a smaller amount of data, **compressed**; used for streaming, circulating
Final Deliverables: File naming conventions

Shades of Watsonville - Alicia Ramirez (1967)
Watsonville Public Library
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 inventory
- Add, correct, and enhance descriptive metadata
- Add, correct, and enhance technical metadata
- Wrap up loose ends in administrative notes
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Musicians play bridal couple in to Armenian wedding reception (1976)
Armenian Studies Program, CSU, Fresno
Create a Digital Preservation Plan

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

Source: Recollection Wisconsin Digital Readiness Toolkit
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** (californiarevealed.org)
- Access copy + MD5s + XML
- Annual integrity checks on files on all files
Digitization Steps

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California Revealed can help digitize and preserve your collections online
 Digitization and Preservation Assistance

**Program Goals**
- Lower barriers to digitization of ‘unrevealed’ local history collections
- Provide online access and long-term digital preservation
- Foster collaboration and encourage regional partnerships between public libraries, archives, museums, historical societies, and community groups to collectively reveal local heritage.

**Application Questions:**
- FEMA’s Risk Index?
- Organization’s operating budget?
- Primary sources of labor?
- Relevant skills / experience?
- Communities represented in nominated materials?
- Recent inventory?
- Ordering copies of the files?
- Digital nominations → max 2000GB (2TB)

*Deadline: July 1, 2024*
Digitization & Preservation Assistance Program Timeline

Apply!
- Partner submits application and nominations spreadsheet.

Accepted
- Partner receives list of items to be digitized and preserved. Prepares items for digitization and ships to CA-R.

Nominated
- CA-R reviews applications and nominations.

Physical Received
- CA-R receives and checks in items.

Physical Processed
- CA-R processes items for digitization.

Sent for Digitization
- CA-R sends items to vendor for digitization.

QC Version Received
- CA-R receives files from vendor.

Published
- Partner is notified files are published online. Reviews files for QC (Quality Control) and updates metadata records.

Preservation Version Requested
- CA-R receives approved files.

Preservation Version Accepted
- Partner and CA-R review and approve files. Partner orders copies of files and original items are returned.

QC Complete
- CA-R stores files for long term digital preservation.
A Guide for Teaching About Women in History
Beyond California Revealed: Metadata Harvests
Q&A
Reflections

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?
Thank you!

Keep in touch:
team@californiarevealed.org