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Project: Planning for Scanning: Step One of the *Handbook for Idaho*
Project Director: Karen Kearns, Idaho State University
Project # T04353-00
Evaluator: Vicki Kreimeyer
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Project Purpose:
As stated in the grant application, the project was "…for establishing standards and procedures needed for major digitization projects through a statewide process. As an example, the project will also include planning the *Handbook of Idaho* project."

Eight steps were identified:
- Literature review and training
- Development of criteria for selection
- Development of standards
- Identification of platforms
- Consultation
- Prototype development
- Develop the plan
- Identify participants

Evaluation Process:
- Read grant proposal and quarterly reports
- Site visit
- Interview project director and library director
- Interview advisory committee member(s)
- Viewed images document

Successful Elements of the Project:

The project achieved a substantial number of its goals, including most of the eight steps outlined in the original proposal. The advisory committee included librarians ranging from small, medium and large public libraries, a staff member from the State Library, one librarian from Boise State University, and the archivist from the Idaho Historical Society. The geographic range represented by these individuals covered much of Idaho. One of the successful aspects of this project was that members of the advisory committee all gained much knowledge about the technologies available and planning elements necessary for digitization projects.

From my perspective, the following elements worked well for this project:
- Focus on planning the technical foundation for a major digital collection was thorough; hardware/software platforms were more varied at the time of this grant, but the committee quickly agreed upon these technologies;

- Standards development did not have to be created from scratch. The committee did its homework and decided to essentially use standards that were already being successfully applied by the CDP.
- The broad based advisory committee participated fully in the project at the beginning, providing each of them an opportunity to learn new skills and improve their own understanding of the requirements of digitization projects.
- The committee meetings were well organized and stayed on task. Participants felt that thorough discussion was encouraged and occurred. Meeting face to face is critical to success in a project like this one where different perspectives are important.
- Two consultants were engaged: Jill Koelling (CDP) and Gayle Palmer (OCLC Western) made presentations to the committee. Koelling provided invaluable background on the Colorado state-wide project and thorough knowledge of the standards developed there; Gayle Palmer was helpful in providing access to the image management system selection – Content DM.
- Outreach to the regional Idaho Library Association conferences helped spread the word and increased understanding in the broader library community.
- Technical decisions regarding the software platform, hardware needs, scanning standards were all thoroughly studied and made within the grant's time frame and schedule.
- The digitization standards developed and adopted have provided a foundation for two projects that followed this one; the *I-Docs* project for Idaho history materials and the larger LSTA funded project, *IDIG*, led by the Idaho Historical Society Archives and Library.

Project Challenges:

This project encountered some difficulties, and from these there are important lessons to be learned.

- The grant project proposal was fully developed by the library director before it was assigned to the project director. As a result, the project director was not part of the planning process and was new to directing a grant funded project. Getting up to speed on this project, its structure, and the requirements of an LSTA funded project took time, especially at the beginning of the grant.

- The grand funded a library assistant position to assist the project director, but hiring requirements and the project director being unfamiliar with the University's procedures resulted in a delay in the hiring, and then the training of that individual.

- The geographic and institutional breadth of the advisory committee had drawbacks. The very small libraries initially part of the committee were challenged to maintain their participation as the grant went forward. Not all

participants provided images for the test data base as planned. Not all universities in the state participated on the advisory committee.

- Communication with an advisory committee spread across this state proved to be a challenge. The project director learned that she needed to communicate more frequently in between the four in-person meetings in order to keep everyone engaged.

- Scope of the project with goal to plan for a statewide digital handbook became more of a strategic challenge than a technical one. More time was needed to build a coalition of support with each major player: each university and college, the Idaho Historical Center and Archives and other regional museums and libraries. As a foundation for a future statewide project, the strategic issues and relationship building are as important as development of the technical standards, selection of software and hardware.

- One final desired outcome, to have two signed Memorandum of Understanding with two regional institutions to continue the development of the Handbook did not materialize. More development of the plan for the Handbook needed to be in place to secure such agreements, as well as opportunity to develop relationships with the institutions and their leadership for successful planning for future cooperative activities.

Project Sustainability and the Future:

- At this time the *Handbook of Idaho* project is not going forward. The project was not funded for a second LSTA grant, and other support has not been found at this time. Selective items are being added to the database as time and resources permit at the Special Collections Department.

- Idaho is rich in small institutions, libraries and museums, whose back rooms may have invaluable photographs and original documents stored in boxes, uncataloged and out of sight. These same institutions have minimal staff, some even lack access to the Internet, and undertaking any digitization project at the local level is unlikely, without major assistance with staff, equipment, training and funding resources.

- Copyright issues concerned some on the advisory committee. Development of guidelines that could be applied now to gifts of documents and images given to institutions would be helpful so that future digitization projects would not be further compromised by copyright questions.

- Regionalization is a reality in Idaho. The project director has developed informal relationships with two local museums. In her reflection on the project, a scaled

down and regionally focused project may be an alternative with more possibilities of success, both for gaining grant support and being on a manageable scale.

- Institutional support is also a critical element for a project to be sustainable. Having a supportive faculty representative on a project advisory board is one way to gain institutional buy in. Good working relationships were established with the Theater Department in order for a large collection of costume design images to be added to the database, and the project director notes that the ease of access is definitely recognized by students and faculty. Building on this kind of success with other departments could be a foundation for a future project, whether it is regional or local in scale. The broad range of responsibilities now assigned to the project director makes taking on such a project unlikely.

- Leadership of a statewide project requires full participation and buy-in with the major players; the universities and colleges, the Historical Society Library and Archives, and other larger museum institutions. The project budget needs to be large enough to support personal outreach to those institutions. Broad participation cannot be achieved without the benefits being clear to the key players.

- Because of Idaho's strong regional culture, such a project would be best led by a neutral third party with a statewide mission and mandate. Certainly the LILI model can be seen as successful in providing statewide access to databases and gaining state funded support. Any statewide project planned needs to find a support base beyond grant funding in order to be sustained. In these difficult economic times, a demonstration project that shows the benefits to communities throughout Idaho would be necessary before our elected officials would consider state funding support for such an effort. Many of the most valuable and unique records and photographs to be part of such a database are most likely stored in boxes in the smallest institutions with least staff, minimal budgets, and in legislative districts of influential legislators. Capturing some of these in a demonstration project, that fosters local buy in, provides skill development, equipment and funding resources could be key to future support.

- Developing a strategy to build such support requires resources: funds, staff, and leadership development and buy in. It requires an opportunity for relationship building with the leaders in each major institution, which was beyond what this grant provided for.

The achievements of this grant provide a solid technical foundation for future digitization grants in Idaho. Two subsequent LSTA grants (*I-Docs* and *IDIG*) have used the digitization standards developed, the software platform recommended and the meta-tagging practices established. The technical foundation is solid. Now strategic planning is needed in a similar focused and step by step approach to develop leadership and support.

The next digitization project focus may need to work from a regional basis and build to a state wide effort. A clear demonstration of regional contributions to such an effort with local and regional buy in could come closer to making the digital *Idaho Handbook* a successful collaboration of institutions and resources.