

EVALUATION SUMMARY – IDAHO STATE HISTORICAL SOCIETY
DIGITAL COLLECTIONS PROGRAM PLANNING

PEER EVALUATOR: RANDY SMITH
LEWISTON CITY LIBRARY

Grant: T07353-00

Project Director(s): Linda Morton-Keithley; Amy Vecchione; Tobie Garrick

Date: October 1, 2010

Evaluation Method:

I visited the Idaho State Historical Society on August 20, 2010 and interviewed Steve Barret and Janet Gallimore, the current Director. Steve was a part of the original group that started the Digital Collections Program Planning grant and Janet came toward the end of the grant.

A few weeks after the site visit, Steve Barrett sent a significant number of files to me via email relating to the project, including meeting notes & agendas, timelines, meeting plans, minutes and working papers, an effort for which I extend my gratitude. Finally, I communicated with Amy Vecchione, Tobie Garrick and Linda Morton-Keithley over the telephone, asking them specific questions about the grant project.

Evaluation Summary:

The Collections Program Planning Grant was really the result of an initial desire on the part of members of the ISHS staff to “go digital” and bring to Idaho the advantages of collections being digitized: (1) accessibility to all of Idaho without having to travel long distances (2) increase the use of their collections on a state-wide basis. Thus, the original concept was a strictly digital initiative of putting Idaho History online. But after counseling with ICFL, it was decided that a greater project of providing the resource capability for all of Idaho to potentially be able to “go digital” was a more fundable and useful approach. So, the original digital idea evolved into this planning grant.

This evolution resulted in 2 objectives: (1) bringing together a group of interested libraries and other cultural institutions that have established repositories willing to invest time and effort in forming a “digital consortium”. This consortium, in exchange for their investment in time and effort, would gain expertise in digitizing collections and at the same time establish a clearinghouse of best practices that could be utilized by any Idaho library or cultural institution wishing to go online with their collections and (2) a digital pilot project done through ISHS that would exemplify to all of Idaho what the consortium had gained in knowledge and experience in digitizing Idaho collections made accessible from any online source.

The grant project accomplished most of its goals. The pilot project was especially successful, due in large part to the work of staff and volunteers and to the ability of its project directors to overcome obstacles in technology and staff work levels. The consortium also seems to have accomplished everything it was intended to do except keep going.

Project Objectives:

According to the grant application, the project will “work towards preserving Idaho’s cultural heritage while providing access to countless collections to people throughout the state.” The project will “bring together a group of interested institutions to create a digital projects consortium in Idaho, to systematically plan for the future and provide training and development opportunities today.”

Two major steps were explained:

1. Establishment of a “functioning digital consortium of interested Idaho libraries”

Several steps were planned to create and utilize the consortium:

A. ISHS will serve as the lead agency;

B. Five planning partners had agreed to participate in the development of the consortium at the time the proposal was submitted and others would be invited to join;

C. Documents governing the various functions of the consortium will be developed and digitally published;

D. An extensive training regimen would be planned in order to gain expertise in creating digital projects.

2. A small pilot project of “two to three photo collections” and a collection of artifacts will be scanned and a dedicated website will be created by the Idaho State Historical Society (ISHS) to provide “an opportunity for the instant application of the skills and knowledge the group has gained while making a unique and vital collection of Idaho’s historical source material available online.”

Overarching goals of the ISHS digitization project include:

A. “...create an online presence that is known to be the “go-to” place for reliable, culturally significant resources pertaining to Idaho’s history.”

B. “...to create alliances and collaborative working relationships with other Idaho libraries ...to provide greater online access to library collections throughout the state.”

Project Method:

A. Digital Consortium: Organization and Communication

Five planning partners for the digital consortium agreed to participate in its development even before the grant proposal was formally approved for funding. They were (1) Boise Public Library; (2) Smylie Archive at Albertson College of Idaho; (3) Eli M. Oboler Library at Idaho State University; (4) David O. McKay Library at Brigham Young University of Idaho; (5) and University of Idaho Library. Other members were added at the beginning of the grant funding timeframe, including Idaho Commission for Libraries; College of Idaho Archives; and Idaho State Historical Society. Initially, Boise State University Special Collections and the Basque Museum and Cultural Center served as informal members, but the Basque Museum volunteered to active participation beginning the 3rd quarter of the grant period. Other institutions were invited during the November 2007 meeting. The College of Idaho withdrew from the consortium at the end of 2007 for both financial and technical reasons.

Documents reveal that the intention of most interested partners in the grant planning intended “to develop the consortium into a project that outlives the grant with the purpose of maintaining consistency throughout the state”. How to develop and successfully implement a way to realize this intention was a preoccupation that ran throughout the grant time period.

Meetings between committee members took several forms and evolved out of the two face-to-face meetings that were held during the grant period, one in November, 2007 and the other in March, 2008 (at the Idaho History Center). Departmental and/or agency heads were invited to attend these meetings as well as the representatives from each agency. The November, 2007 meeting was especially eventful. It was here that both a mission statement and set of goals were drafted by the planning members. Shortly thereafter, the group chose the name *IDIG: Idaho Digital Memories* for the consortium along with a mission statement: “*IDIG* provides digital access to the unique resources and special collections of Idaho’s archives, libraries, museums and other cultural institutions promoting Idaho’s identity to the State and beyond.” Mission goals were also agreed upon:

1. Provide reliable access and a single portal for all users;
2. Support implementation of a collaborative culture to help Idaho institutions develop and maintain a statewide identity;
3. Enhance capabilities of cultural heritage staff to develop digital assets by providing training for collaborative participants;
4. Expand utilization of digital content by providing value added information to the resources.

A fifth intended goal, dealing with sustainability of the consortium, was officially put on hold at that time until the upcoming meeting in January, 2008 but was actually addressed later.

Various sub-committees (“task forces”) were formed at this meeting in the key areas of copyright, metadata, collection development, and communication. These groups met as needs arose to accomplish their goals. Also, consortium partners met fortnightly via teleconference during much of the grant period, ensuring easy and timely communication between responsible sub-committees and partners. Funding for these calls came from the reallocation of travel funds intended for the College of Idaho, made available when they withdrew from the consortium. A consortium project wiki was maintained to document important information used in conducting consortium business. This wiki was referenced extensively in minutes and reports and appears to have been an effective tool for intra-group communication.

Consortium Outreach

Efforts to make the consortium known utilized several different formats and approaches. For one, a website was constructed: www.idig.lili.org – to inform other libraries and cultural institutions about the consortium, its mission, goals, standards and policies. For another, information about the consortium was presented at the Idaho Museum Association in April, 2008 by Patty Miller, Director of the Basque Museum and Cultural Center.

Digital Education and Training

A core component of the consortium was training and education that would provide competent standardization for digitization projects that could form a “best practices” framework for Idaho libraries and cultural institutions. In fact, it seems to have been the training aspect of the grant project that served as the link that tied the two aspects of the project together. So, training opportunities were a significant part of the grant budget. They were also a significant part of both consortium activities and ultimately, the digital pilot project. Completed training opportunities included:

- Contentdm – one day training event conducted by OCLC
- Digitization of Historic Collections – a three-day workshop conducted by the American Association for State and Local History
- Digital Oral History – a one-day workshop offered by Ball State University
- Streaming Audio and SMIL for Oral Histories – a one-day workshop from OCLC
- A Beginner’s Guide to Metadata webinar offered by the Society of American Archivists
- Museums and the Web – a four-day conference offered by Archives and Museum Informatics
- Developing and Managing Digital Program webinar offered by OCLC
- Overview of Metadata for Digital Programs webinar offered by OCLC
- Persistence of Memory: Sustaining Digital Collections – a two-day workshop offered by the Northeast Document Conservation Center
- University of Utah -- a one-day field trip taken to meet with digitization staff at Marriott Library

Training opportunities were enhanced by the guidance and leadership of contracted consultants Liz Bischoff and Leigh Grinstead of BCR. Much of their work was with the IDIG Planning Committee in forming best practices documents, governing frameworks for the consortium and overall project management.

B. Digital Pilot Project

1. Web site Creation:

The digital pilot project was specifically designed as a “learning opportunity,” in that the entire process put into practice the skills learned from the various educational opportunities listed above.

Item selection: Suggestions on what to digitize prior to the formal grant funding period ran the gamut of newspaper accounts, county & state records, and building 360 virtual tours. But at the July, 2007 meeting of the ISHS Digital Initiatives Program Group, it was decided instead to establish at least two criteria for item selection: (1) that a thematic approach be taken and (2) that the focus would be on items of special interest and utility to educators (project documentation includes surveys). Several topics were suggested, principally the Civil War and various topics under the general idea of “water resources”. The topic of mining was selected, because it is a central theme in Idaho’s history and culture and would probably “garner the widest attention”. This also meant that ultimately many agencies would be able to contribute because mining is so prolific to

Idaho. It seems from the documentation that these decisions were all made solely by ISHS staff and not by consortium members.

A relatively small sampling of items were selected, after consultation with BCR and also the Mountain West Digital Library. Best practices standards were implemented in scanning. According to the final report, several issues of newspapers from early Idaho mining communities were scanned from microfilm and poorer quality images were further processed in Photoshop. Audio items selected included approximately 10-15 oral histories in their original analog formats and converted to WAV files. 10-12 handwritten documents were added and accompanied by typed transcripts due to the difficulty of reading some of the handwriting. Maps, mostly mining region maps, were scanned on the large-format scanner (purchased in 2007 from funds approved by the Governor and state legislature) and saved as TIFF files. JPEG2000 files were created, enabling the user to zoom on specific details of the scanned map images. Artifacts added to the selected items were photographed from various angles. Finally, 50-100 black & white images were scanned. Masters were saved as TIFF images and also saved in JPEG format for viewing on the site.

Metadata Schema: Dublin Core was selected as the metadata schema. Dublin Core is a relatively simple system to use, with a small learning curve, it provides access through up to 15 different elements that are customizable, is widely used by repositories world-wide. A customized Dublin Core template was developed by the ISHS metadata subcommittee, which included a "high-level subject heading controlled vocabulary". Dublin Core is also the schema that is used with Contentdm, the management system decided upon by the Digital Initiatives Group. Contentdm was one of 2 management options available, and was selected on the basis of budget, its user-friendliness and because it is used widely for digital collections, regional support was readily available.

Files were stored on the Contentdm server, backed up monthly.

Copyrighted items were not selected for inclusion, in order to ensure that copyright would not be violated. No watermarks were applied to digital images, but images were scanned at 75 ppi, thus ensuring that their use not infringe upon the revenue stream of the owning institution.

Mining In Idaho was successfully launched in August, 2008. The training, software and best practices standards created by the consortium training were put into practice resulting from this searchable database and companion online exhibit entitled *Loaded: Extracting Idaho's Mother Lode*. A staff survey was taken upon release of the beta version resulting in various changes requested by staff.

2. Website Outreach and Promotion

Promotion of the digital pilot project included a presentation by Amy Vecchione to the Southwest Library Association in April 2008; presentation by Linda Morton-Keithley at the Boise Public Library Hillcrest Branch in May of 2008 and another presentation at the Idaho Genealogical Society in July 2008.

Other promotion included posting to various blogs, email lists, the State Board of Education newsletter, and listserv announcements. Amy Vecchione was featured on Boise Public Radio.

Project Results and Impact:

Over the course of the grant timeline (July, 2007-June, 2008 plus a 2-month extension) there were essentially 3 different Project Directors. The grant was originally written by Troy Reeves, who left ISHS shortly thereafter in the Spring of 2007. Tobie Garrick (the original contact person for the grant proposal) took over until January of 2008, followed by Amy Vecchione. A requested extension was granted until August 31, 2008. The final report was submitted by Linda Morton-Keithley. Even though the staff turnover was considerable, the project resulted in an equally considerable amount of positive result. Clearly, the chief setback was the lack of sustainability in the consortium.

The consortium met as an entire group two or three times (the documentation is confusing and contradictory), but subcommittees met more frequently. While the core mission of the consortium, to establish itself as a project that would outlive the grant period, was not realized, many of its vital components yielded good results. A high degree of expertise was gained by consortium participants through workshop attendance and by going on-site to institutions with proven expertise in digital collections management. Learning first-hand from experts in the field will possibly continue to benefit Idaho institutions and their users. The level of expertise among consortium member institutions in doing digital projects increased. So, even though the consortium did not continue beyond the time period of the grant timeline, it was not a totally wasted effort.

The sustainability issue never found an effective solution and there are reasons for this, the primary one being a lack of sustainable funding. At a March 2008 meeting, several different sustainability models were proposed but none were adopted. This was followed up by a conference call from BCR consultants Liz Bischoff and Leigh Grinstead to Ann Joslin in April of 2008 in which it was reiterated that the “overriding question for each model is funding”. The governance models all centered around placing management of the consortium under a specific agency, namely a college or university in Idaho, ISHS, ICFL through the Lili program or a shared effort between ICFL and ISHS or possibly even BCR. None of these options proved tenable. Ann also noted that this project “is still in the developmental stage”.

In their *Final Report and Recommendations* BCR also suggested that an equally important reason for a lack of sustainability in the consortium was that “the governance structure still remains to be completed, as agreement could not be reached as a host structure”. They also reiterate that this project was still in its developmental stage and that “...funding to make this happen would be available, should the appropriate proposals be submitted.”

However, that doesn't mean that the consortium effort was a total waste. Documentation for the knowledge base of the consortium can be found on the Idaho Digital Memories pages (<http://idig.lili.org/>) and is accessible thru a search for “Idaho Digital Memories”. The true impact of the discontinuance of the IDIG consortium cannot be measured, because it was placed on hold at the beginning stages of development. Interviews with former ISHS participants consistently reflects not only disappointment that the consortium did not continue to develop, but that the training, the mission, the experiences with consultant feedback and the opportunities to observe state of the art digital repository operations in other locations was invaluable.

The digital pilot project was launched in August 2008 and it is still online today (<http://history.idaho.gov/collections/>). The project was completed in spite of several significant difficulties that were encountered. Technological challenges were one difficulty. An adequate server and server space, network problems and management of large files are examples. A second difficulty was the lack of staff time available to do the actual work, such as scanning images. Documentation shows that volunteers were recruited to help with this, with good results. A third was loss of leadership; management of the digital project changed 3 times, due to personnel leaving. It is many times difficult to come into the middle of a project with the same passion and motivation as those whose passion started the project. But this was somewhat remedied by new staff that ably took over and finished the project on time. The digitization pilot project will be of lasting value and may serve as a model for future projects.

The Project in Retrospect – Project Director(s) and Staff Perspective:

I presented the following questions to former staff and Project Directors. Their answers are presented verbatim.

What worked well for this project and what did not?

“Finished pilot project worked well. The idea of a consortium may have been a good idea, but ISHA, while possibly being a good partner, was not suitable to be the host of the consortium.”

“How the consortium was implemented did not work well” “ICFL would have been a better starting point for the consortium”

“The digital pilot project made an overall positive impact on ISHS staff and worked well. Hosting the consortium did not.”

“The digital standards learned and implemented in the pilot project worked well.”

“ISHS staff worked well together.”

“Everything worked well for the pilot project. The sustainability of the consortium did not.” “BCR was very helpful in providing leadership and wise advice throughout the project.”

“The entire project lost its steam about halfway through. ISHS lost its director; the grant principles all left; the new director did not see it as a priority; it became a project driven by staff, not by top leadership.”

“Digitization final outcome worked well.”

“I don’t think anything worked well. I think for every piece of the project that had a good outcome there was a high amount of stress and consternation. In the end, we have a failed attempt at building a consortium, and also a website for ISHS for their digital collections, and then an ED that doesn’t want to support the ISHS digitization program. I think that means it didn’t work well at all.”

What are some suggestions or changes the PROJECT DIRECTOR(S) and STAFF would make if they were repeating this project today?

“The consortium idea came from ICFL.”

“The time commitment was not thought through adequately.”

“I would create a business plan and a separate non-profit entity to manage a main portal. I don’t think that anyone in Idaho that already works at a library would be able to run this at this point. No one is going to be able to step up. If anyone, it should be ICFL,

but that's only because they can. I don't know what changes should be made, honestly. I would have done this differently."

"I would get items for the digitization project from other members of the consortium."

"In other states, there is a university that is the host for the statewide portal. I think Idaho should look into partnering with another state. The problem with that is which state. Northwest Digital Archives might be an ok place to go, but they don't really do hosting yet. It would be nice if they did. There are so many organizations trying to do the same thing and trying to be the main portal for everyone – that's just hard. Utah had offered. Washington State Archives offered, and NWDA. I would investigate those angles more."

"I would have budgeted more staff time; I would not have incorporated the grant-funding model for financial sustainability."

"I would not work with the same people on the project. In the future I'd like leaders at my organization to support my work, not make my work suffer."

"More resources from the beginning"

"I wouldn't change much of anything." "Try to find a way to put the tools in place before the grant got started."

"ICFL or someone else would be the host site. ISHS would be a good partner, but not a good host."

What are some of the things they would do exactly the same?

"My passion and my expertise I would not change."

"I would not change our long-term goals. I would use Contentdm"

"Almost everything."

"Amy was the right person in charge."

"I would have chosen different people and different leadership."

"I would do the digitization objective exactly as we did."

"The project did have one positive result; the digitization project, which will be of lasting value and might serve as a model for future projects."

Did they allow enough time?

"Yes"

"Not near enough time for the consortium. The development process of the consortium was drastically underestimated, but may have been alleviated by someone with better consortium leadership."

"Yes. More than enough. The time was necessary but adequate."

"We needed more staff time for digitizing. This was probably because all the images came from ISHS."

Did they need additional resources, more participation, more publicity?

"Yes, we needed more of each of these."

"Yes, all three."

"Everything was fine. We were especially adequate in staff participation. They were great."

"No one wanted to step up to be the hosting institution. The participants and partners did not seem to be invested in the project, not did they support it."

Did the Commission provide adequate assistance throughout the project?

“The initial suggestion for the consortium was the wrong direction. ISHS was not a good fit to be the host. There was passion for the digitization project but not really for the consortium suggestion from ICFL.”

“ICFL was great. They either provided it or made it possible. ICFL probably played a role in getting BCR as well.”

“Yes, they were great.”

“I am not sure. They did give me an answer to all my questions when I called asking for help.”

“ICFL assistance was adequate for the time. Nobody could have foreseen the staff turnover, the funding issues, etc.”

Final Thoughts:

In a way, the documentation shows a grant project that was a house divided between doing two smaller grant projects within the framework of one larger grant proposal. It also shows the dominate role that ISHS played in the fulfillment of the proposal. The documentation shows that every member of the ISHS project team can “stand tall” in giving of themselves to this project.

The lasting legacy of this project is currently in the digital pilot project, still accessible online (<http://history.idaho.gov/collections>). But it needs to be remembered that this is a planning grant, intended to be a preparation for things to come. Wouldn't it be great if we can honestly say that better results are ahead of us because of the work that was done in this grant program.

The uniqueness of historical documents is two-fold, first in subject matter and secondly in availability. Both of these characteristics lend themselves to the value of grant projects such as this one.

Respectfully submitted,

Randy Smith

