

Digitization in the Real World

**Lessons Learned from
Small and Medium-Sized
Digitization Projects**

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The Craft Revival Project: Library Leadership in Creating Connections between Small Cultural Institutions

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Abstract

The Craft Revival Project is a collaborative digital project partnering a mid-sized academic library with six small cultural heritage institutions in order to document the historic effort to revive handmade crafts in the western part of North Carolina during the late 19th century and the early 20th century. The partnership among these diverse institutions has allowed for the creation of a product that no one of the individual institutions could have created on its own. This article describes the benefits of the project to the partners in this collaboration including those of increased technological capacity, raised collection care standards, and increased publicity for and visibility of the institutions. It also describes lessons learned from the project including those regarding the workflow and staffing levels that are most appropriate for a collaborative project of this kind.

Keywords: Appalachia, Craft Revival, Digital project management, Digital projects, Digitization, Handicraft, Library-museum collaboration.

Introduction

The Craft Revival Project (<http://craftrevival.wcu.edu>) is a collaborative digital endeavor led by Hunter Library of Western Carolina University (WCU), partnered with six small cultural heritage organizations, all located in the mountains of western North Carolina. The project sprang from a successful 2004 North Carolina Exploring Cultural Heritage Online (NC ECHO) planning grant that led to four years of funding, beginning in 2005. Hunter Library's Special Collections, Penland School of Crafts, John C. Campbell Folk School, and WCU's Mountain Heritage Center formed the initial partnership, with the Southern Highland Craft Guild joining in 2006. Two Cherokee organizations, the Museum of the Cherokee Indian and Qualla Arts and Crafts Mutual, joined the project in 2008, bringing the total number of project partners to seven. The project documents the historic effort to revive handmade crafts in the western part of North Carolina during the late 19th century and the early 20th century; this effort helped to revive mountain traditions, create networks of artisans, and boost the economy of the area. The website and associated database tell the story of this movement and the people involved in it through images, texts, and other digitized documents from the collections of the partner institutions.

The partner organizations all have holdings documenting Craft Revival history and all provide the public with access to their collections. A team based at Hunter Library oversaw the project and worked with staff coordinators at each of the associated partner organizations. Hunter Library employs approximately 45 full-time staff. Western Carolina University, part of the University of North Carolina system, is a regional comprehensive university of approximately 9,000 students.

Most of the partner organizations are quite small, some with only a single staff member to manage their archival collections. The Mountain Heritage Center (MHC), part of Western Carolina University, is a regional museum. Established in 1975, the MHC works through its collections, programs, and publications to interpret current studies of Appalachia. The other project partners are separate

from WCU. The John C. Campbell Folk School was founded in 1925 in Brasstown, North Carolina, and was modeled after traditional Danish folk schools, or folkehojskoler. In its early years, the Folk School offered instruction in traditional handiwork skills such as woodcarving, weaving, dyeing, and farmwork. These traditions continue at the Folk School today, along with new and more modern courses on topics including photography, storytelling, and cooking. The Museum of the Cherokee Indian is located on the lands of the Eastern Band of Cherokee Indians, in Cherokee, North Carolina. The Museum and its collections tell the story of the 11,000-year documented history of the Cherokees; the archives include photographs, books, and other materials associated with Cherokee history. Penland School of Crafts was originally founded as a community craft organization in 1923 in Penland, North Carolina, under the name Penland Weavers and Potters. Today Penland offers workshops in crafts including glass, metals, photography, textiles, and wood. Qualla Arts and Crafts Mutual (QACM) is also located on Eastern Band lands in Cherokee, North Carolina. This cooperative craft organization was founded in 1946 to preserve and advance Cherokee arts and crafts, and this mission continues today. QACM showcases historical and contemporary examples of Cherokee crafts and provides an outlet for members to sell their craft items. The Southern Highland Craft Guild was chartered in 1930 as the Southern Mountain Handicraft Guild, with a mission to educate people about traditional handicrafts and to market the crafts of its members. Today the Guild is located in Asheville, North Carolina and provides juried membership to over 900 artists and craftspeople in the southern Appalachian mountains.

A planning committee comprised of members from the partner institutions, Hunter Library staff, and outside advisors made technical choices early in the project's planning. This group based many decisions on the NC ECHO Guidelines for Digitization, which recommend Dublin Core as the basic metadata standard for digital projects in North Carolina (2007). The committee chose an OCLC-hosted instance of CONTENTdm for the digital collection management system, and for controlled fields adopted several

standard thesauri, including Library of Congress Subject Headings, Library of Congress Name Authority Files, and the Getty Art & Architecture Thesaurus.

Numerous collaborative digital projects are documented in the library literature, including many that focus on regional or statewide engagement. The Colorado Digitization Program, now the Collaborative Digitization Program, is one such program that has created digital projects through relationships with museums (Bailey-Hainer & Urban, 2004). Digital Past, from the North Suburban Library System in Illinois, is another example of a project that has brought together libraries and museums of various sizes (Schlumpf & Zschernitz, 2007). The Southern Oregon Digital Archives has also pursued collaborative relationships for some of their collections, including the First Nations Collection, which brings together materials documenting the indigenous peoples of southwestern Oregon and northern California (2004). The Craft Revival Project is on a smaller scale than many of these projects and as such can provide some lessons learned about the challenges and rewards associated with small-scale digitization projects.

Learning from Project Challenges

The Craft Revival Project ultimately met its goals, but that success did not come easily. Along the way, the project encountered and addressed challenges related to limited resources, understaffing, technical problems, and geographic distance between the partner institutions.

When the project was first envisioned, one of the major intended outcomes was technological capacity-building at each partner institution. The original project workflow relied heavily on the partner institutions, involving them in nearly all steps of the process, including item selection, scanning, metadata creation, and upload into CONTENTdm. The role of Hunter Library was to coordinate and support the work of the partners, administer the database, ensure that metadata met project standards, and provide the contextual story and interpretation of the movement through the website. The intention

was that the hands-on experience would position the partners to undertake digital projects of their own in the future. This workflow did produce some of the expected benefits for the partners, but it also created a number of difficulties for the project.

Heavy reliance on time commitments from staff at the smaller partner institutions presented the most significant problem with this workflow. Each original project partner had at most two individuals contributing to the project work of selecting and scanning items, creating metadata, and loading items into the CONTENTdm Acquisition Station. Additionally, several individuals worked in their institutions on a part-time basis, further placing constraints on their time. Project partner Michelle Francis, the archivist for Penland School of Crafts, was one such participant who worked on a part-time basis. Francis described the need for realistic staffing as a primary lesson learned. Describing any steps that she would take in undertaking a similar project in the future, Francis stated, "I think I would have a more realistic expectation if I did this again on what... the demands on my time [would be]" (personal communication, November 2, 2009). She noted that the project required "a lot of hours for a part-time person to work into a part-time schedule." Peter Koch, Education Coordinator at WCU's Mountain Heritage Center, also identified the longer-than-expected time commitments as an issue, noting that "it takes a fair bit of effort to put an individual item up [onto the database]" (personal communication, October 20, 2009).

This original vision of a project that would rely on partner institutions for much of the production was also directly tied to the level of staff resources that Hunter Library initially devoted to the project. Since the role of Hunter Library was initially to provide training, coordination, and review of the partners' work, rather than production of the work itself, a large in-house staff devoted to the project was not part of the original plan. The library director at the time planned to lead the project himself, a Craft Revival subject specialist was hired to provide interpretive content, a technical staff member was to work on the website and provide technical support, and part-time student assistants were hired as needed. These staff structure choices meant that no members of the permanent library

faculty, except the director, were involved in either the initial planning of the project or as part of the original project team, and this was an oversight. Most notably, the failure to involve the library's Cataloging Unit deprived the project of a source of expertise and labor that might otherwise have been available. Even after a metadata librarian position was created to help with the project, the Cataloging Unit's contributions were limited during the early years of the project by difficulties with recruitment for the new position and by turnover within the position.

The project's staffing situation was further compromised when, shortly after the project began, the library director was assigned significant additional responsibilities within the university and consequently had little time to devote to the project. This reduction in the director's involvement meant that the project did not receive the high-level support and direction, additional resources, and institutional legitimacy that would have encouraged library staff to fully support the project. At this point, the subject specialist took on the leadership role in the project. For some time after this, the project continued to be understaffed, with as few as two Hunter Library-based staff members working on the project at any time. This staffing level was inadequate to fully support a project of this scope.

The project also faced differences in technological capabilities among the partner institutions and challenges in providing support to these geographically separate organizations. In contrast to prior assumptions, not all partners had reliable high-speed Internet connections at the time the project started, and connectivity was required for uploading data into the CONTENTdm system. Connectivity proved a concern for much of the first two years of the project. Additionally, the small partner institutions, many without IT departments, relied on training and support from Hunter Library when they needed assistance with project work. Because most of the partner institutions are in rural settings, some as far as 100 miles away from the coordinating library, any technical problems that could not be solved by phone or email contact could not always be addressed immediately by the Hunter Library Project Team. This underlined the importance of communication between the Project Team and the staff

at each partner organization, and the importance of not making assumptions about existing technical capacity.

The partners' limited experience with digital projects and the previously mentioned restrictions on their time had implications for the quality of the work produced. Early in the project some partners struggled with metadata consistency, use of CONTENTdm, and scanning issues resulting in image crookedness, blurriness, lack of contrast, or incorrect resolution. Staff at Hunter Library had to correct these problems in a process that proved both time consuming and frustrating.

Hunter Library took a number of steps to deal with these difficulties. The library held training sessions for all partner staff and provided partners with individual training and technical support as needed. The project director developed two intensive training sessions supported by a 100-page workbook distributed to project partners. These step-by-step manuals guided partners as they worked through the steps of scanning, modifying images, creating metadata, and uploading digital files into the system.

Over time, a reworked, larger project team was put into place at Hunter Library. The Craft Revival subject specialist continued to serve as project director. Three members from the Cataloguing Unit—the head of cataloguing, the metadata librarian, and the metadata assistant—were also part of the team. Two technical staffers from the Systems Unit—a technical support specialist and a web specialist—participated as well. Three project assistants—a research assistant, an image specialist, and a project archivist—replaced undergraduate and graduate student workers. This larger team proved better able to handle the workload of the project.

Finally, with all partner institutions struggling with limited time and staff resources, the Project Team redeveloped its workflow to complete work without overburdening any of the partners in the collaboration. Hunter Library's Project Team recognized that each partner had different strengths and different needs for support. The library Project Team eventually assumed responsibility for more of the project work while tailoring tasks at the partner institutions to best

reflect each partner's abilities. Partners continued to digitize their items and create metadata descriptions for them, but Hunter Library brought all of the CONTENTdm work in-house and had librarians in the Cataloging Unit check the metadata and assign Library of Congress Subject Headings to the records. This new workflow, implemented just before the Cherokee partners joined the collaboration, immediately brought more consistency to the project.

The Cherokee institutions, while interested in becoming part of the project, made it clear that they had little time or staff available to contribute to item selection, scanning, and metadata creation. To accommodate these needs, the Hunter Library Project Team made further modifications to the workflow at these institutions. The project director handled item selection and project assistants completed scanning and basic metadata creation tasks on location at the two Cherokee sites. Once items were scanned and basic metadata created, the project director wrote interpretive descriptions for the items. Finally, this information was passed on to the Cataloging Unit where staff entered the information into CONTENTdm and added subject headings.

While personnel from the two Cherokee institutions were not involved in the day-to-day production, they assisted in the item selection process when possible and were available to answer questions about their collections. Staff at these institutions, primarily liaisons Vicki Cruz at QACM and James "Bo" Taylor at the Museum of the Cherokee Indian, provided access to the Cherokee community that might not otherwise have been available to non-Cherokee project staff. These staff members at the Cherokee institutions spoke to the importance of the project in their community and made connections with relatives of craftspeople featured in the project and to others with knowledge of the Craft Revival era. These connections enabled fact checking and the gathering of additional information.

The Craft Revival Project experimented with different workflows evolving from one dependent upon partner staff to accomplish work into one relying more heavily on staff hired and supervised by Hunter Library. The fourth year of the project, using the lead-library-centered

model, saw improvement in the number of items added over those in previous years. Project assistants, working closely with the project's director, received in-house training and day-to-day supervision in photography, scanning, image manipulation, and metadata creation. Since the project assistants were not juggling their duties with other work responsibilities, they could concentrate their full attention on the project. Image quality improved dramatically; images were scanned and cropped correctly, manipulated to the appropriate resolution, and saved in proper formats. Descriptive metadata provided to the metadata librarian was more complete and better organized. The metadata librarian ensured this metadata and the subject headings within the metadata were consistently applied, regardless of origin. In short, processes ran more smoothly and fewer things had to be redone using the workflow where Hunter Library took on more of the production tasks.

Project Successes

The Craft Revival Project's collaborative effort strives to tell the story of the movement and make it accessible to a wider audience through the World Wide Web. This mission has been successful and there were other unexpected, positive outcomes that came from the project. These successes varied by institution and included improved collection care and organization standards, increased knowledge of digital project practices, collection development opportunities, networking opportunities, publicity for the involved organizations, and the creation of a digital product that no one of these institutions could have made on its own.

One beneficial effect of the project was improvements in the way that some partner institutions manage their collections. Perhaps the greatest growth in collection management and development occurred at the John C. Campbell Folk School. When the project began, the school's folklorist, David Brose, handled project contributions. Realizing the scope of the project and the time commitment involved, Brose brought on Anna Shearouse as a scanning assistant and, in recognition of her skills and passion for the subject matter, Shearouse

was promoted to the position of archivist at the Folk School. According to Shearouse, her work on the project as an archivist has had a tangible and lasting impact on the Folk School. Shearouse, in collaboration with Craft Revival Project director and a consulting archivist, developed the first collection policies and finding aids in the Folk School's history. Shearouse has since cataloged and created finding aids for collections not related in scope to the Craft Revival Project, stating, "I'm not sure that would have happened without the project's structure" (personal communication, October 30, 2009).

Similarly, Qualla Arts and Crafts Mutual had their collection cataloged for the first time through their participation in the project. The project director worked with the QACM director and a project assistant to photograph the collection, provide accurate documentation, and create and implement a numerical inventory system. To ensure the sustainability of this system, they developed a workflow to register new objects as they are added to the collection.

Even partners who entered the project with fully cataloged collections were able to improve their collection management. Deb Schillo, librarian for the Southern Highland Craft Guild, believes that her knowledge and management of the Guild's collection has also improved. According to Schillo, the Guild's archives had previously "been managed by volunteers in a hit or miss way and the project has given a real framework [to the collection]" (personal communication, November 2, 2009). Staff at the Mountain Heritage Center and Hunter Library's Special Collections also credited their project work with helping them to make new connections within their collections and update their records (P. Koch, personal communication, October 20, 2009; G. Frizzell, personal communication, October 29, 2009).

The partners also gained valuable technical skills and materials that benefited their institutions and collections. Each partner received a desktop computer, scanner, and external hard drive as part of the project. Several partners pointed to their experience with Adobe Photoshop, provided with each computer, as one very useful skill that they developed. George Frizzell, Head of Special Collections at Hunter Library, stated that his experience with Photoshop enabled him to

better manipulate scanned material to increase readability (personal communication, October 29, 2009). Peter Koch and the staff at the Mountain Heritage Center honed their technical skills to the point that they provided training sessions to other partners.

Michelle Francis of Penland School of Crafts stated that an unforeseen benefit of her scanning and Photoshop skills has been her ability to fulfill requests for digital reproductions of material held in the archives at Penland. Francis also described the progress made in another important area:

I think it is important to mention that I'm one of the partners that is from a very small institution. Our archives are not located in a fireproof building with a sprinkler system and probably won't be any time soon, though [an archive] is in the master plan of the school. So, while having some of our oldest and most irreplaceable documents on a website, while not the ideal form of preservation, is far better than nothing and is a very welcome byproduct of this project. (M. Francis, personal communication, November 2, 2009)

In addition to technological steps forward, an increased awareness and visibility of the partners' collections has been another positive consequence. Schillo described the history of the Southern Highland Craft Guild's archives as "being shuttled from back room to back room for decades, but now it is seen as a real investment that has brought in scholars and has really added a lot to our place in the community" (personal communication, November 2, 2009). Penland's Francis also highlighted increased awareness in the local community as well as with researchers. The overall web presence and specifically the "Craft Today" and "History" pages located on the main Craft Revival website have given Francis the web presence she has desired throughout her eight years as Penland's archivist (personal communication, November 2, 2009).

The increased visibility of the collections involved also led to unexpected collection development opportunities. As the primary contact person listed on the website, project director Anna Fariello received several communications of interest from people who held private collections that related to the Craft Revival. The project's

policy is that only items held in public collections can be digitized and made part of the project; so in these instances Fariello encouraged owners to consider donating these collections to one of the partner institutions. This encouragement yielded the donation of the Scroggs Collection to the John C. Campbell Folk School, a collection that fit in well with the scope of the existing Folk School holdings. This connection might not have been made without the visibility of the project.

Many partners established or strengthened relationships with the other partner institutions and discovered meaningful connections between holdings in their collections. Peter Koch of the Mountain Heritage Center provided the following anecdote:

One area in particular that it has worked is with the [subject] of corn shuck crafts. We have been able to connect that material together to tell a much more complete story of those crafters and their work because of the connections that we have made to the material that the Southern Highland Craft Guild has. The connection between our material and theirs has allowed the telling of a much fuller story. (P. Koch, personal communication, October 20, 2009)

Deb Schillo of the Southern Highland Craft Guild echoed this experience and said she especially values the personal connections that she has developed during the project. “I knew that Penland and John C. Campbell were members of the Guild and had some history with us but we never interacted very much,” stated Schillo, who credited the project with allowing her to meet the other partners and, in her words, “see where things overlap and to fill in some of our holes [in our collection]” (personal communication, November 2, 2009).

In some cases, one institution holds objects made by a certain craftsperson, while other institutions might hold photographs, biographical information, or other documents or objects related to or created by that person. For example, Goingback Chiltoskey was one of the most celebrated Cherokee woodcarvers of the Craft Revival era. He taught wood crafts at the Cherokee high school and participated in regional events such as the Craftsman’s Fair of the Southern Highlands. The collection of the Museum of the Cherokee Indian

includes historical and contemporary photographs of Chiltoskey, as well as photographs of some of his family members, and items carved by Chiltoskey. The collection of the Southern Highland Craft Guild includes photographs of Chiltoskey participating in Craftsman's Fairs between 1948 and 1953, biographical information about Chiltoskey in the member files, and items carved by Chiltoskey. Additionally, the collection of the Mountain Heritage Center includes carved items attributed to Chiltoskey. Users of the Craft Revival website have the opportunity to learn about Chiltoskey's background, see examples of his work, and view both historical and contemporary photographs of him, including some showing him at work. Though physically held in different institutions, the digital collection brings these items together and lets users discover them in one place. Numerous similar examples exist throughout the Craft Revival collection. Through these combined collections, users gain a richer picture of the people, the crafts, and the movement as a whole.

Conclusion

The Craft Revival Project has successfully met its challenges and is now supported by a smoothly running organization equipped to create and lead digital endeavors. At the time of this writing, the project has completed its goals and wrapped up most production activities, as most of the partner institutions have exhausted the relevant items held in their collections. Hunter Library has a staff structure in place to continue accepting and uploading items on an as-needed basis so that the collection may continue to grow on a smaller scale.

The project also achieved many of the goals for capacity-building and improvements within the partner institutions hoped for when the project was first envisioned. Partner collections are better managed and staff members within the partner institutions have learned new skills. The project has also served as a means of preserving vulnerable partner collections. By making images of materials from partner collections available on the web, the project not only made these materials accessible to a wider audience, but also provided the

institutions with valuable publicity. Partners have benefitted from connections they made with other institutions working on the project.

These successes only came about after some hard lessons. Partner institutions and Hunter Library learned that digital projects are labor-intensive and that adequate staff should be in place before such projects are undertaken. Project experience also taught that a workflow depending on the lead-library for the production of images and metadata runs more smoothly than a model dependent on partner contributions. While some small cultural institutions may have the ability to consistently deliver large numbers of high quality images and metadata, the limited resources typically available to small cultural institutions make it unlikely that all such institutions will be able to do so. A lead-library centered model is more likely to produce consistently positive results.

This experience also provided lessons about the lead-library model. Success of this model requires a strong institutional commitment. Library administration must make it clear that they are behind the project and expect all appropriate library staff to contribute to its success. Key individuals who will work on the project should be involved in the planning of the project, both to ensure their support for the project and to ensure that they understand their role within it. If the library is new to digital projects, top administration must expect to be called on to clarify roles, expectations, and lines of authority as the library develops its digital infrastructure. Whenever possible, more than one individual within the library organization should be capable of performing key functions, including leadership functions, to ensure continuity in case of turnover.

Any library seeking to start a major digital project must realize that digital projects are resource intensive and the library must be prepared to devote significant resources to ensure success. While many large research libraries can easily support a specialized digital project team, small-to-medium-sized libraries will likely have to work harder to put the pieces in place as they build their digital infrastructure. The medium-sized library should probably not consider taking on a major project without having already completed a

number of small-to-medium-sized projects. Digital infrastructure needs to be in place at the beginning of the project.

The Craft Revival Project Team intends to apply the lessons learned to future digital endeavors. It is hoped that these lessons may also be useful to other libraries and small institutions seeking to collaborate in the future.

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