

Digitization in the Real World

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

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Hudson River Valley Heritage: A Journey in Collaborative Digitization

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Abstract

This chapter presents a case study of Hudson River Valley Heritage, a decentralized collaborative digitization effort coordinated by the Southeastern New York Library Resources Council (SENYLRC). The case study documents the journey of a network of small organizations with limited resources and limited digitization experience in developing an online digital repository of historical materials housed in libraries and cultural heritage organizations in an eight country region in New York. The intent of the chapter is to describe the process-- from inception, through planning to full implementation-- and share what was learned for those who might be considering similar ventures.

Keywords: Collaborative digitization, CONTENTdm, Digitization, Digital libraries, Library materials – digitization, Museum and library collaboration.

Introduction

Libraries have always been about sharing--providing their user communities with access to information through a network of shared resources. The digital age has made sharing possible on a much wider scale than ever imagined. With these new opportunities comes the need for enhanced collaboration and an expanded notion of

community. This chapter presents a case study of an effort to expand information sharing through a collaborative digitization project. The case study documents the journey of a network of small organizations with limited resources and limited digitization experience in developing an online digital repository. The intent of the chapter is to describe the process-- from inception, through planning to full implementation--and share what was learned for those who might be considering similar ventures.

Hudson River Valley Heritage (HRVH) is a collaborative digitization service coordinated by the Southeastern N.Y. Library Resources Council (SENYLRC). Several SENYLRC staff members were responsible for the conception, planning, and implementation of HRVH: John Shaloiko, Karen Starr, Patricia Carroll-Mathes, Christopher Hyzer, Tessa Killian, and Zack Spalding. I am also proud to be a member of this team as the Digital Services Librarian.

Our work would not be possible without the aid and support of a committee of regional professionals dedicated to helping move the service forward. The cultural heritage organizations that have risen to the challenge and enthusiastically learned to digitize their local history holdings make HRVH the valuable resource that it is today.

Background

SENYLRC is one of nine New York Reference and Research Library Resources Councils (“3Rs”). These multi-type library consortia, established and chartered by the NY State Board of Regents in the late 1960s, provide a variety of services to their members including continuing education, access to electronic resources, services to the health care community, consulting, information technologies, advocacy, and more recently digitization. Each New York 3Rs Council is “governed by a locally elected Board of Trustees and has substantial input from member libraries through a robust committee structure; and each receives operating and special program aid from the State of New York, along with locally generated funds.” The overriding goal of these systems is to do “collectively what their constituent libraries and library systems cannot do individually or what can be done better

together” (NY3Rs Association, Inc., n.d.). It was in this spirit that HRVH was born.

SENYLRC’s mission is to support its members in the Mid-Hudson Valley in order to enrich their services and enhance access to information for their users. The council strives to achieve service excellence in libraries by:

- Thoughtfully applying emerging technologies to resource sharing, collection building, information access and communications;
- Providing imaginative, accessible and relevant development opportunities for staff at all levels;
- Becoming a focal point for the exchange of ideas, collaboration, the development of new tools and the promotion of the transforming power of libraries.

The Hudson River Valley of New York is one of America’s most historic locales. HRVH provides free online access to historical materials from digital collections contributed by public, academic and special libraries, archives, museums, historical societies and other cultural heritage organizations in the Mid-Hudson Valley region of New York State. HRVH documents the history of this eight-county region from the early colonial period to recent decades and includes photographs, manuscripts, clippings, cookbooks, scrapbooks, 3-D objects, yearbooks, oral histories, maps and newspapers.

The success of HRVH results from the effort and enthusiasm of a network of people committed to its growth. The roles and responsibilities for the development of HRVH are shared among SENYLRC staff, the organizations that contribute their unique resources, and an advisory committee of dedicated professionals. Participating organizations are responsible for the entire digitization workflow with generous help and support from the HRVH team at SENYLRC. The Council provides the technical infrastructure, access to CONTENTdm® digital collection software, equipment, documentation, and training. It is this model of collaboration and shared responsibilities that make HRVH a successful digitization

service for the region. There was very little digitization expertise in the region when this journey began a decade ago and everyone involved had a lot to learn. At times it seemed like a “two steps forward one step back” process. HRVH is now a thriving digital service as well as a community of trained professionals working towards a common goal of providing unparalleled access to our region’s rich history.

Planning

Collaborative digitization became a program concept through SENYLRC’s Regional Automation Committee in the year 2000. The following year SENYLRC embarked on a strategic planning process funded with a Library Services and Technology Act (LSTA) grant awarded by the NY State Library. Representatives from a variety of organizations in the region were invited to serve on a digitization task force to assist SENYLRC in developing a regional plan. Liz Bishoff, then Director of the Colorado Digitization Project, was hired as a consultant. She was instrumental in laying the groundwork for what would become HRVH.

The task force, under Bishoff’s leadership, specified five objectives to be met during the planning process:

- Identification of regional collaborative partners building on current digitizing efforts.
- Identification of issues/challenges/roadblocks which will impact implementation of a regional digitization program.
- Identification of local collections which are candidates for digitization.
- Development of a coordinated funding strategy that addresses the need for support from both public and private sources.
- Coordination of a regional digital institute to train project participants in the areas of digitization.

Eric Roth, then Archivist at the Huguenot Historical Society, was contracted by SENYLRC to study the current digitization landscape in the region in an effort to address several of these objectives. He conducted interviews with staff members at organizations that were identified as possible partners in a regional collaborative effort

including academic libraries, public libraries, and government agencies. He discovered that digitization efforts, future plans, and attitudes about digitization varied greatly among these different types of organizations. A few organizations had begun preliminary digitization projects. Others expressed interest in digitizing, but acknowledged many roadblocks including a lack of technical infrastructure and expertise, lack of staff, lack of funding, and a lack of intellectual control over their physical holdings. Intellectual property and copyright issues as well as selection were identified as challenges to overcome. Roth noted that smaller organizations--historical societies, schools, churches, and state historic sites--were understaffed and underfunded and would have difficulty digitizing given their limited resources. These smaller organizations could benefit greatly from partnerships with larger organizations (Roth, 2001).

The interview process revealed the roles that SENYLRC might play in a regional digitization effort. SENYLRC could develop and maintain expertise in digitization, foster communication, provide training and consultation, help select equipment, identify funding sources, and provide standards to organizations that wanted to digitize their own collections. The interviews also revealed that there was little interest in having a central organization, like SENYLRC, handing the digitization for other organizations (Roth, 2001). Eric Roth documented his findings in a report titled: *Opportunities, Challenges, and Priorities: Developing a Collaborative Digitization Plan for the Mid-Hudson Valley* (Roth, 2001).

SENYLRC developed and sponsored a Digital Information Institute funded with a LSTA grant. Experts from around the country presented workshops covering all of the steps involved in building digital collections. The first session provided an overview of the entire process. Subsequent full day sessions were devoted to scanning, metadata, project management, copyright, preservation, digital preservation, and storage and access of digital materials. The Institute was attended by 327 people from interested regional organizations between February and October of 2002.

SENYLRC released *The Digitization Program Plan for the Southeastern Region of New York* in April 2002 (Southeastern New York Library Resources Council, 2002). The Plan identified the following goals to be achieved:

- Organizational Infrastructure – Create a cross-organizational steering committee comprised of representatives from seven to nine key institutions in the region to guide the implementation initiatives for this regional digital effort.
- Collection Selection Criteria – Establish selection criteria and identify target collections to be digitized by cultural heritage institutions within the southeastern New York region.
- Standards – Agree upon and adopt standards for metadata and scanning that will facilitate collaborative digitization.
- Legal Issues – Identify the legal issues relating to digitizing collections and develop an awareness strategy to educate the staff of the regional cultural heritage institutions contemplating digitizing a collection.
- Accessible Collections – Create a regional collection of digital objects contributed by cultural heritage institutions within the southeastern New York region, which is open, distributed, and easily accessible by the public.
- Training – Provide training and consulting opportunities, focusing on the digitizing of materials and managing digital projects, for staff of the cultural heritage institutions (Southeastern N.Y. Library Resources Council, 2002, p.7).

Phase One: Implementing the Plan

A permanent Digital Advisory Committee (DAC) was established by SENYLRC's Board of Trustees at the end of 2002 to assist SENYLRC staff in implementing the goals of *The Digitization Program Plan*. Participants in the Digital Information Institute as well as staff from organizations that were already digitizing were invited to serve to ensure that there were members with some digitization expertise on the committee. With the assistance of the committee, SENYLRC was

positioned to take on the roles of coordination, consultation, documentation, and communication.

Standards and Best Practice Development

The committee spent 2002-2003 developing documentation to address selection, digital imaging, and metadata drawing largely from standards and best practices already in use around the county. Documentation created by the Research Libraries Group was adapted and expanded upon to provide general selection criteria for potential partners. The *Western States Digital Imaging Best Practices* was adapted for the digital imaging guidelines (BCR's CDP Digital Imaging Best Practices Working Group, 2008). Dublin Core was selected as the metadata standard for the region. The committee determined that Dublin Core's simplicity would allow a diverse group of organizations with varying local practices to successfully contribute records to a shared repository. A brief metadata guide was developed drawing largely from the Dublin Core Metadata Initiative documentation (Dublin Core Metadata Initiative, 2003). SENYLRC's initial metadata documentation was purposely general and not too prescriptive.

A web site, Hudson Valley Heritage (HVH), was created to disseminate information about the project including background information, planning documents, and committee activities. An extensive digitization resource list was developed incorporating the documentation produced by the committee with links to online resources developed by and for projects around the country. Copyright resources, digital audio resources, general digital imaging and metadata resources, and a link to the Dublin Core web site were included as well as links to digital projects and collections that had already been created within the region.

Selecting the Platform

The Digital Advisory Committee explored a variety of software packages for digital collection building in 2003 including Greenstone, Luna Insight®, and CONTENTdm®. After evaluating these options, CONTENTdm®, a turn-key solution for developing, maintaining, and providing end-user access to digital collections, was selected. It was

reasonably priced, came pre-packaged with the Dublin Core element set, and did not require a lot of technical expertise to implement. Additionally, server software, a user interface, client software for importing, describing, and uploading items, and a web-based administrative interface for managing and editing collections were all included with the license. The client software could be installed in different locations making it an appropriate choice for a decentralized regional project. SENYLRC would host the server and the web site, yet any interested organization could have access to the client software and web-based administrative site providing them with full control of the metadata creation and management process.

Getting Started

In the summer of 2004 SENYLRC and the Digital Advisory Committee were positioned to invite organizations to contribute digital collections to HVH. The Committee recommended that a “regional hand-holder” be available to support and assist organizations with their projects. SENYLRC staff had little experience or expertise in digitization. SENYLRC’s Director, knowing my interest, allowed me to receive training and mentoring in order to take on this role. The early phase of the project provided an opportunity for me to gain hands-on experience building digital collections. I also received personal training from several staff members at the United States Military Academy Library at West Point who were already using CONTENTdm® to build digital collections. As the Director and Board of Trustees identified digital services as a valuable emerging program, I was encouraged to obtain an MLS degree. With the support of SENYLRC, I pursued an MLS at St. John’s University and my degree was granted in 2007.

Three organizations were selected to be the pilot contributors: Vassar College Archives and Special Collections Library, Marlboro Free Library, and Wilderstein Preservation. The committee deliberately selected different types of organizations to explore various workflow options. Two laptops and a scanner were purchased to loan to early participants as needed. SENYLRC was not positioned

to fund digitizing activities at these organizations, but helped to offset the costs of their projects with these purchases.

Vassar College Library already had a collection of digitized 19th century photographs available on its web site. Ron Patkus, Director of Archives and Special Collections, seeing the value of participating in a regional collaborative, suggested that SENYLRC staff migrate the collection to CONTENTdm®. The original metadata records were created in a MySQL database adhering to AACR2 cataloging rules and structured to appear as MARC records on the web. This project provided an opportunity for SENYLRC staff to determine the steps involved in moving a collection from one platform to CONTENTdm® as well as how to “map” or “crosswalk” AACR2/MARC metadata to Dublin Core metadata elements.

The Marlboro Free Library was selected to digitize and contribute a photograph collection documenting the history of this small Hudson River community. The Director, Jim Cosgrove, had already received digitization funding through a New York State Assembly member grant. He originally planned to host the collection on the library's website. When SENYLRC's Director heard about his plans, he approached Jim and encouraged him to load the collection onto HVH instead. The library used the \$7,000 member grant to purchase a scanner and hire a professional cataloger to create the metadata. A local photographer volunteered to create the digital images.

Wilderstein Preservation, the third pilot contributor, is a historic house museum with an extensive collection documenting the history of the Suckley family who owned and lived in the house for over a century. Wilderstein digitized and contributed a theme based collection documenting the family's participation in World War I through the American Field Service. This collection includes a photo album, diaries, letters, postcards and 3-D objects. Duane Watson, archivist and curator at Wilderstein, provided leadership and support to a library school graduate student. With my assistance, and equipment from SENYLRC, the entire digitization process was done in-house.

It is difficult to determine in advance the amount of time digitization projects take, especially at the beginning when there is a steep learning curve. The Marlboro Free Library and Wilderstein Preservation projects took a full year to complete. Neither had digitized before and the project staff was only available part time. Vassar's collection was uploaded to HVH by August 2004, just as the other two organizations were getting started. The availability of Vassar's collection in HVH generated enthusiasm in the region. Several new organizations expressed interest in joining the project and began contributing material before the first three projects were fully evaluated. As a result, once an evaluation did occur and some necessary modifications were identified, these other organizations, in addition to the pilot organizations, were affected by the changes.

Lessons learned from Phase One

The first phase of the project revealed the need for two important changes: a web site redesign and an overhaul of the initial metadata guidelines. The initial project web site, which had been designed as an informational resource, became obsolete once CONTENTdm® was licensed. CONTENTdm® comes with a web-based user interface for searching and browsing the collections. A redesign, building on the CONTENTdm® foundation, would allow the collections to take primary importance and provide a consistency to the site while still including project documentation. The existing metadata documentation lacked input guidelines and examples as well as information about how and when to use specific fields. Early participants recommended that the metadata guidelines be more prescriptive, but the document also needed to meet the needs of a range of contributors: from the volunteer to the professional cataloger.

The web site redesign was completed in the fall of 2005. The second generation of the web site included a name change from Hudson Valley Heritage to Hudson River Valley Heritage to correspond with the designated Hudson River Valley National Heritage Area. SENYLRC hired a web development team to create a new logo for HRVH and to customize the CONTENTdm® interface.

Building the new site with CONTENTdm® as the foundation allowed the collaborative collections to be the focus of the site, but also would allow the designers and SENYLRC to add pages to the basic structure.

One of the issues that emerged during the pilot phase was the lack of individual organizational identity in CONTENTdm®. There was consensus that users should experience a consistent look and feel as they navigated through the site, but that individual organizational identity was also important. To address this issue we built “home” pages for each organization on top of the CONTENTdm® structure. These pages give each organization a place to describe their collection(s) and link back to their own web site. These pages also contain a search box that allows users to limit their search to the participant’s collection.

The web design team suggested that a comments feature would add value to the site and wrote a program for that purpose. Allowing visitors to post comments to items in HRVH proved to be a complementary addition to the site by encouraging interaction with and among the user community. We intended this feature to be an avenue for users to provide additional descriptive information about resources. While this certainly does occur, we have found that it is used most often for sharing thoughts and memories about the people, places, and events documented by the collections.

The metadata revision, completed in February 2006, was accomplished through efforts of SENYLRC staff, the then chair of the Digital Advisory Committee, a contributor from one of the pilot organizations, and a consultant from OCLC. SENYLRC staff surveyed the metadata documentation created for many other collaborative projects in developing guidelines for HRVH.

We surveyed the metadata style guides, application profiles, data dictionaries, and online records of dozens of projects. Here are a two: Western States Dublin Core Metadata Best Practices was heavily consulted. The latest version, CDP Metadata Working Group Dublin Core Metadata Best Practices is available at: <http://www.bcr.org/dps/cdp/best/dublin-core-bp.pdf> (last accessed January 6, 2010). University of Washington Libraries Data Dictionaries is also a good

source: <http://www.lib.washington.edu/msd/mig/datadicts/default.html> (last accessed January 6, 2010). Most CONTENTdm implementations can be accessed from this page on the OCLC web site and is a good place to start looking at how other organizations create Dublin Core records in CONTENTdm: <http://www.oclc.org/contentdm/> (last accessed January 6, 2010).

The resulting *HRVH Metadata Style Guide* included expanded instructions for using fields, examples of field usage, and many additional fields that were not in the original document. For example, one added field, called Digital Collection, was needed to allow participants to group items from their main collection into sub-collections based on topics or themes.

By the time the new metadata style guide was complete, participating organizations were well into their projects. In fact, one organization had already contributed over 500 items. Fortunately these early participants understood that they were part of a new and emerging service and were willing to edit their records to reflect the changes in the metadata guidelines. Open communication between SENYLRC staff and the staff of these organizations was instrumental in identifying desired changes to both the web site and the metadata guidelines, allowing for necessary modifications.

Phase 2: From Project to Service

In the fall of 2005, SENYLRC and the Digital Advisory Committee began to discuss transitioning HRVH from an emerging project to an ongoing service. Among the issues that needed to be addressed were setting policies for the service, developing a sustainable funding model, and identifying strategies for recruiting and training new contributors to ensure the growth of collections.

Setting Policies

The early phase of the project reinforced the importance of individual support and consultation. SENYLRC established a policy to provide an organization up to 28 hours of on-site help by SENYLRC staff in the first year of contribution, and 10.5 hours in each

subsequent year. As the availability of equipment was also identified as a need, a permanent scan center was established at the SENYLRC office and two additional scanners were purchased and made available to contributors on three-month rotations.

Funding the Service

Developing a funding model took some time. There was a strong desire in the beginning to encourage participation by not charging fees, however, SENYLRC's Executive Director and Board of Trustees realized that a free service with substantial personnel and technology costs would not be sustainable in the long term. They sought a solution that would achieve some cost recovery, while at the same time encourage participation. There were initial discussions about charging per digital object, but this model seemed complicated and difficult to manage. DAC recommended that membership in the council become a requirement for participation in the HRVH service. The Board established a new affiliate membership category with a lower annual fee than regular membership. This category would allow organizations that had minimal need for SENYLRC's other services to participate in HRVH. As a result, SENYLRC's membership grew beyond traditional libraries to include historical societies, museums and other cultural heritage organizations. The Board of Trustees decided that a minimal fee was appropriate when factoring in the associated benefits of training, consultation, support, software, equipment and hosting.

Recruitment and Training

Recruiting and training new contributors was achieved with another LSTA funded workshop series that ran from 2005-2007. The series was similar to the earlier Digital Information Institute except there was more focus on CONTENTdm® and HRVH as participants were required to upload 35 items to HRVH as part of the learning process. The series, *Training for Digital Asset Management through the Hudson River Valley Heritage Program*, was attended by 34 people representing 26 organizations in the region.

From October 2005 through early April 2006 participants attended workshops that provided them with the fundamentals of building digital collections: a session to introduce them to digitization and the HRVH service, project management, copyright, digital imaging, metadata, and CONTENTdm®. In April and May attendees created 5 digital objects (digital image and metadata) in HRVH with the assistance of SENYLRC staff. A mid-program review was held in June and participants presented their 5 items for review and discussion. Most participants achieved this mid-program goal, but a few did not and, in fact, were unable to attend the remainder of the series. Staff changes and insufficient time to devote to digitization were cited as the major reasons. In June of 2006 the Board of Trustees celebrated this successful new service by making HRVH the focus of SENYLRC's annual meeting. Representatives from two participating organizations spoke about their experiences and SENYLRC staff presented HRVH to a packed room of attendees, including members of the press.

From July 2006 through March 2007, the remaining participants attended workshops on digital preservation, sustainability, and promotion, as they worked to complete the required 35 items. The final session provided an opportunity for participants to share their experiences with each other and with SENYLRC staff. By this session, 18 organizations out of the initial 26 had uploaded items to HRVH and all 18 became members of SENYLRC. A few organizations, however, fell short of the required 35 items. The reasons for this vary, but the biggest obstacle was lack of time to devote to their projects.

Lessons Learned from Phase Two

Initially, individual organizational identity was important, so the user interface was customized to provide quick and easy access to resources by contributing organization. From the revised HRVH home page there were only three ways to access materials: searching by keyword, browsing by contributing organization or by broad resource type. Once there were more than twenty organizations represented, the need to be able to browse by broad topic became apparent. A small working group developed broad topic categories that could be

assigned to each item. As with the creation of the *HRVH Metadata Style Guide*, we looked at other sites that had implemented broad topic categories for browsing to help us formulate our list of terms.

In developing our broad topic categories we consulted the following sites: Arizona Memory Project (<http://azmemory.lib.az.us/cdm4/topicbrowse.php>); North County Digital History (<http://history.nnyln.net>); and the Ohio Memory Project (<http://www.ohiomemory.org/custom/ohiomemory/om/index.php?Guidelines.>)

The initial list had twelve topics, but was soon expanded to seventeen after application and review. As a result of the metadata modification, all records needed to be edited. SENYLRC staff provided editing assistance for metadata records to reflect these new topic categories. The web site was enhanced to include a new “Explore” page to provide browsing by topic as well as browsing by personal names, corporate names, and locations indexed in the records. Users can now browse the collections in multiple ways by clicking on the “Explore HRVH” button from the home page. We also refreshed the look and feel of the home page to include a slide show with rotating images from each of the collections.

Group discussions at the 2005-2007 training workshops became increasingly lively as the series progressed. The participants enjoyed learning from each other through sharing their experiences, expertise, challenges, and successes. It became apparent that SENYLRC needed to foster this development by providing networking opportunities beyond the training series. A listserv had been established at the start of the series primarily as a way for SENYLRC staff to communicate efficiently with all HRVH participants. Participants were encouraged to use the listserv as a means of communicating with each other once the series had commenced. At the end of the training series a Users Group was established to encourage HRVH participants to gather periodically.

By the conclusion of the two year training series in 2007, the project had become more than just a service; HRVH was a community. SENYLRC staff had gained digitization, mentoring and

teaching experience and had developed comfort in their roles as experts. The participants felt empowered and excited by their emerging skills and were eager to continue contributing to HRVH.

Current State of HRVH

The HRVH Community

Today, with comprehensive guidelines and documentation, an experienced and available staff, a funding model, and communication avenues in place, HRVH is a sustainable, thriving service. There is a wide range of digitization activity among the contributing organizations: some organizations upload items on a regular basis; others contribute sporadically as time allows, and a few projects have stalled because of staff changes.

The HRVH team at SENYLRC consists of four people who dedicate time and expertise to the service. The Executive Director is responsible for the overall direction of the service. The Manager of Technology and Administrative Services is responsible for management, training, grant writing, recruitment and publicity. As the Digital Services Librarian, I provide training and one-on-one consultation, support, and assistance to all participating organizations. The Systems Manager installs software, maintains the server and web site and provides technical assistance/trouble shooting to SENYLRC staff and all participating organizations.

The HRVH Users Group meets quarterly and provides an opportunity for participants to network with each other. These meetings allow SENYLRC staff to update participants on new directions, software upgrades, or to discuss the digitization of specific materials such as scrapbooks. The greatest benefit of these meetings is the opportunity to draw on the expertise and experience of all members of the group. For example one member led a discussion on developing fee and permission policies for reproductions because his organization handles many such requests. Another member led a discussion/demonstration on preservation of original materials drawing on his extensive expertise and experience. These meetings strengthen the sense of community in addition to providing

Responsibilities	HRVH Contributor	SENYLRC and DAC
Project Management	<ul style="list-style-type: none"> • Project Manager • Project planning • Determine workflow 	<ul style="list-style-type: none"> • Guidance • Assistance • Training
Project Planning	<ul style="list-style-type: none"> • Project purpose • Audience/user needs • Mission/Goals/Objectives • Budgets: time and cost • Selection • Copyright 	<ul style="list-style-type: none"> • HRVH Collection Selection Criteria • Identify organizational partners in the region • Identify and include unique collections that reflect the historical significance of the Hudson River Valley
Digital Conversion Process	<ul style="list-style-type: none"> • Digital conversion: in-house or outsource • Metadata creation • Quality control 	<ul style="list-style-type: none"> • Digital Imaging Best Practices • HRVH Metadata Style Guide • Assist with digital conversion and metadata creation • Provide CONTENTdm® software • Digital lab at SENYLRC • Loan equipment • Quality control on first batch of items
Access to Digital Content	<ul style="list-style-type: none"> • Provide text for the organization's HRVH webpage • Create links from your homepage to HRVH • Online exhibits 	<ul style="list-style-type: none"> • Host CONTENTdm® server and all of the digital objects • Provide a HRVH webpage for organizations • Provide high speed bandwidth • Host and provide links to online exhibits
Evaluation	<ul style="list-style-type: none"> • Evaluate collection use 	<ul style="list-style-type: none"> • Usage statistics • Survey of users
Sustainability	<ul style="list-style-type: none"> • Funding • Update metadata • Storage/preservation of digital masters 	<ul style="list-style-type: none"> • Committed to maintaining HRVH • CONTENTdm® upgrades • Server upgrades • Increase bandwidth as necessary
Marketing/Promotions	<ul style="list-style-type: none"> • Promotions to organization's constituency and to local community 	<ul style="list-style-type: none"> • HRVH Communications Plan • Press release templates • Bookmarks

Figure HRVH-1. Detailed breakdown of roles and responsibilities for HRVH. Table created by Tessa Killian, Manager of Technology and Administrative Services at SENYLRC.

educational opportunities. The division of the digitization responsibilities has been solidified (Figure HRVH-1 provides a detailed breakdown of roles and responsibilities.)

Recruitment

In order for HRVH to grow in scope, content and therefore, value, recruitment of new members is essential. To introduce HRVH and encourage participation, SENYLRC staff frequently attends meetings of library directors, historical society directors, and other regional meetings attended by cultural heritage professionals.

In 2008, SENYLRC was able to offer small grants, supported with state funds, to help organizations offset the costs of digitization. A sub-group of the Digital Advisory Committee worked with SENYLRC staff to develop a grant application and identify content areas that would be funded. These included the Colonial period, the American Revolution, and items related to the 1909 Hudson-Fulton Celebration in preparation for the 2009 celebration commemorating the 400th anniversary of Henry Hudson's voyage up the Hudson River. The grant application was purposely designed to be brief and simple because the amount of money being offered did not warrant a lengthy application. Four organizations--two current contributors and two new organizations--were awarded funds to digitize materials from those content areas. SENYLRC hopes to offer more grants in the future.

Training

In the fall of 2006 SENYLRC developed their own curriculum for training new contributors. *Training Basics for HRVH* is a four-day series that covers the fundamental skills needed to begin building digital collections in HRVH. The first day introduces the service as well as project management and copyright considerations. The remaining three days are devoted to scanning, metadata creation, and CONTENTdm®. This training series is offered twice a year over a several week period. The workshops are required for new contributors and are also open to current contributors who need a refresher or need to train new staff members.

Promoting HRVH

The importance of constant marketing and promotion cannot be understated. SENYLRC's marketing activities have included the creation of bookmarks and postcards, press releases, and promotional spots on public radio. HRVH collections have also been linked from appropriate Wikipedia articles bringing in users from the popular online encyclopedia. Additionally, SENYLRC's Systems Manager has optimized Google's ability to index HRVH content which has greatly improved access to the site through the search engine. It is not only important for us to promote the site as a whole, but it is equally important for HRVH contributors to market to their own target audience. The organizations that promote their collections have the most visitors and the most user comments posted to their items.

Recent Projects

In 2007 SENYLRC was awarded Library Service and Technology Act (LSTA) funds to digitize materials documenting African American history in the region from slavery to the early 20th century and to create associated lessons plans for educators. An online exhibit was created to complement the digital collection and provide context for the resources in the collection. *The Missing Chapter: Untold Stories of the African American Presence in the Mid-Hudson Valley* provides a visually appealing and informative journey through a collection of manuscripts and images that tell the stories of African Americans in the region going back to the colonial period. *The Missing Chapter* is very popular and widely used by teachers in the region (Hudson River Valley Heritage, 2010.)

A 2008-2010 LSTA funded initiative was a pilot project to digitize historic newspapers. The platform for HRVH Historical Newspapers is Greenstone, an open source software. SENYLRC staff had experimented with uploading newspapers to CONTENTdm® and discovered that newspapers overwhelmed the other content in HRVH and searching resulted in too many newspaper articles. The LSTA grant funded the customization of Greenstone and the digitization and creation of metadata for ten years of a daily paper. HRVH Historical

Newspapers is linked from the HRVH home page, but searching the newspapers occurs from a separate interface.

In 2008-2009 SENYLRC partnered with the Greater Hudson Heritage Network (formerly the Lower Hudson Conference of Historical Agencies and Museums) and the Sound and Story Project of the Hudson Valley on a collaborative project to plan for the identification, digital reformatting, and increased accessibility of oral histories housed in cultural heritage organizations in the region. This initiative was funded by the Institute of Museum and Library Services (IMLS). The major planning activity was a regional survey to determine what organizations held oral histories, what formats and condition they were in, and the topic areas covered by the interviews. Ten oral history interviews were digitized and included in HRVH as a pilot project to determine the steps involved.

Although SENYLRC was a pioneer among the New York 3R Councils in establishing a regional digital repository service, the other eight 3R Councils are in various stages of regional digital collaboration. CONTENTdm® is the platform for each of these services, thereby making it fairly simple to link them together using the CONTENTdm® multi-site server. New York Heritage (<http://www.newyorkheritage.org>), a web portal hosted by the Northern NY Library Network, provides one interface for searching the harvested metadata from all of the nine regional services. As a result, SENYLRC's HRVH contributors now benefit from the exposure of their digital content at the state level.

Digitization: Benefits and Challenges

Benefits and challenges of digitization have been revealed by SENYLRC and HRVH contributing organizations. One benefit for SENYLRC has been a new found role of the Council for historical societies and museums that previously would not have considered membership. Prior to HRVH, SENYLRC helped member libraries improve their services to patrons. Through HRVH, SENYLRC has created a service that directly benefits the public, thereby increasing visibility of the Council. Building digitization expertise in the region

enhances the program tremendously as new contributors can learn from those organizations that have been involved in the service longer. It is a joy to watch people become empowered by their new skills and share their expertise with others.

One challenge from SENYLRC's perspective is achieving consistent quality in digital images and metadata across the collections. Even with the provision of documentation, the quality of digital images and the richness of metadata records vary from collection to collection. Another challenge is our desire that the collections grow at a steady pace. We do not require the adherence to timelines and we have noticed that collections grow with the availability of staff dedicated to the project. The biggest challenge faced by the Council is ensuring that we have the funds to keep the service moving forward. Funding consists of revenue from membership dues, a portion of New York State funding to SENYLRC, and federal grants when awarded.

An informal survey of HRVH participants was conducted to collect their thoughts on participating in HRVH. They were asked, in two open-ended questions, to reflect on their digitizing experiences and provide some insights that would benefit the readers of this chapter. They were asked to share the challenges and benefits of digitizing at their local institutions as well as the challenges and benefits of participating in a collaborative effort.

Challenges at the local level identified by the respondents include: the steep learning curve, copyright considerations, workflow and staffing issues, and the need for good planning and organization. Benefits of digitizing collections were identified as: learning new skills and feeling empowered by them and the rewarding feeling associated with knowing that once hidden collections are now available to a wide audience. For some, digitizing collections has provided opportunities to collaborate with local school districts on creating lesson plans; for others it's been identified as a source of community pride.

There were mixed reactions regarding the use of CONTENTdm® as the platform for HRVH. Some respondents indicated that it is cumbersome to use and therefore a challenge to participating in

HRVH, while others identified the software as a benefit of participation in the service. Respondents overwhelmingly shared benefits associated with HRVH participation including: group training, one-on-one assistance, the availability of equipment on loan, technical support, networking opportunities, world wide exposure of collections, and no requirement for a high level of in-house technical expertise. Another benefit is HRVH's ability to virtually unite disparate collections when several organizations hold complementary resources. In fact, several contributing organizations from the same locale collaborated on a physical exhibit, with an accompanying virtual HRVH exhibit, documenting the history of education in their town.

Conclusion

Ten years into our collaborative digitization journey, HRVH is an award winning service, having been formally recognized by two NY State organizations--the New York State Library awarded SENYLRC the 2006 Joseph Shubert Award and Nylink awarded SENYLRC with a 2007 Achievement Award. Also, in 2006, we received Greater Hudson Heritage Network's Award for Excellence recognizing HRVH as a valuable service to cultural heritage organizations. Participants continue to add items to HRVH, SENYLRC continues to recruit and train new members, and the Digital Advisory Committee is dedicated to supporting SENYLRC staff in identifying new directions for the service. Our collective efforts have created an active community of digitization experts in our region in addition to providing a wonderful resource where HRVH visitors can discover the rich history of the Hudson River Valley.

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