

# South Carolina Digital Collections

Business Plan, 2008 -

## **Statements of Purpose**

### **Mission Statement**

The South Carolina Digital Collections (SCDC) is a collaborative effort that includes South Carolina's schools, libraries, archives, museums, and other cultural heritage institutions. SCDC's mission is to encourage our collaborators to create, maintain, and promote digital collections that represent South Carolina's historical and cultural resources while following state-level guidelines that are based on national standards and best practices. SCDC intends to be the model for other institutions digitizing materials in the state, and will strive to provide the knowledge, resources, and capacity necessary for those institutions to complete their digital projects. SCDC also seeks to enhance the overall education and scholarship of South Carolina's citizens by coordinating free and unlicensed access to these digital collections through a central web presence.

### **Vision Statement**

First and foremost, SCDC envision a central web presence servicing the South Carolina community through open access to the digital collections available in the state. We envision that SCDC ultimately will become an indispensable research tool for K-12 students, researchers in higher education, and other life-long learners as they visit the SCDC website to study and compare documents concerning South Carolina's history and culture. Educators will also find SCDC's range of digital collections to be an invaluable source of material for dynamic and interactive lesson plans. These educators and users will add another dimension to SCDC's material by contributing their own knowledge about the items available online to the learning community through a system of open communication and transparency that encourages sharing information and maintaining collaborations. The web site will give greater access to the rare and special South Carolina historical materials housed in the many museums, libraries, archives, and historical institutions in the state.

### **Values Statement**

SCDC's essential foundation is based upon a set of core values that inform and guide our services and practices. These values include access, life-long education and scholarship, collaboration, duty to the citizens of South Carolina, and a commitment to the public dissemination of South Carolina's history and culture.

### **Statement of Goals and Objectives**

1. Collaborate with South Carolina museums, archives, libraries, and other historical and cultural institutions on digital collection-related projects

- a. Assist S.C. historical and cultural institutions with their scanning projects, while following the SCDC guidelines
  - b. Explore collaborative funding opportunities with other institutions
2. Improve SCDC's infrastructure for digital collections
  - a. Update and maintain the digital asset management system and web site
  - b. Develop and provide policies, procedures, and tools for the creation and use of digital content and metadata
3. Enhance preservation of digital collections and metadata
  - a. Research national efforts to preserve born-digital content
  - b. Develop plans to ensure the preservation of created digital content and metadata
4. Improve and support the communication of services, collections, and research of the SCDC staff and participants
  - a. Maintain and update the SCDC website
  - b. Establish successful working groups for metadata guidelines, web site design, finding aids, needs assessment, education, and marketing
  - c. Publish and promote the policies and procedures for using the scanning centers
5. Foster and promote digital library education and training
  - a. Train institutions as needed for creating digital collections
  - b. Promote the SCDC within library, archive and cultural heritage communities across the state and worldwide
  - c. Provide on-the-job training or internships for library school students or those interested in learning about digital collection management
6. Foster and promote the SCDC collections to users in the state and worldwide
  - a. Create a promotion and marketing plan
  - b. Create a plan to work with teachers to develop lesson plans for the collections
  - c. Promote the SCDC to users worldwide

## **Executive Summary**

### **Introduction**

Most students use the internet to do their research and if libraries, museums, and archives want to remain relevant in today's society, they need to go where the audience is – the Internet. Individually, this is a daunting and exorbitantly expensive task, however if these institutions combine efforts and work together, as libraries, historically, already do, then the task becomes feasible and new relationships become possible. The SCDC would like to fulfill this need.

More than half of the states in America have some sort of collaborative state-wide initiative to digitize their state's cultural and historic materials and make their images and multimedia files freely available on the web for research and educational purposes. South Carolina needs to become a part of this national trend to remain current with educational needs.

Since South Carolina was not the first state-wide digital collections initiative, it has a wonderful opportunity to learn from other states and possibly take a few giant leaps forward, creating the ideal state-wide initiative.

The participants who can submit their materials to the SCDC site are librarians, archivists, museum curators, or any South Carolina cultural heritage institution that would like its materials digitized and included in the site.

The audience for the SCDC is broad. It includes K-12 students learning about subjects in school that relate to materials represented on the site; teachers and graduate students in education wanting to either develop resources to help others or to just use the resources in class; higher education researchers who want to compare materials and get organized before deciding whether they need to travel to the different institutions to do their research; life long learners interested in South Carolina history; all of the above who want a wealth of information at their fingertips and not have to go to travel a lot to other sites electronically or geographically to see South Carolina historical artifacts.

### **Service Description**

There is a long-range need for South Carolina to increase the pace of digitization, as well as to participate in a national trend to build a regionally-based metadata and/or digital object repository. This is part of a greater need to make South Carolina materials of statewide significance or of special interest more widely available to the general public and to ensure their preservation. These two service-needs arise from the inability of many institutions to commit to digital collections projects because of the lack of resources, training, equipment, or knowledge of how to begin and sustain the digitization process. SCDC would contribute its services to institutions in need by allowing them to use regional scanning centers and by training them in creating metadata, scanning, and other best practices. SCDC's services would then be extended to the general public by making these digital copies available online through the CONTENTdm multi-site database.

### **Needs Assessment**

A Needs and Resources Survey was conducted by PASCAL (Partnership Among South Carolina Academic Libraries) in late 2004. Sixty-five institutions responded to the survey and participants included academic libraries, public libraries, museums, historical societies, religious institutions, and local governments. According to this survey, 52 of the 65 respondents, or 80%, would like training in digital processes. Also, 44 respondents, or 68%, would like PASCAL to digitize collections on their behalf, while 43 respondents, or 66%, would like to receive consulting on digitization options. Forty-three respondents would also like PASCAL to review

their collections for potential digitization and 41 respondents, or 63%, would like PASCAL to establish a regional digitization center and would like assistance with project management.

In order to assess the readiness of institutions to begin digitizing collections, PASCAL asked responders to indicate what digitization policies, trained staff, and equipment were at their disposal. Most respondents, 49 (75%) have some sort of digitization equipment, with 44 (68%) institutions having a flatbed scanner, 2 (3%) with automatic feeders, and 3 (5%) with overhead scanners. Less than 20 respondents indicated that they had institutional policies on digital collections, with 9 (14%) having policies on copyright permissions, 5 (8%) with policies on selection criteria, 4 (6%) with policies on technical standards, metadata standards, project planning, condition of materials, and other digitization policies. Only 2 (3%) respondents have policies on migration. Only some of these institutions have staff trained in selecting materials for digitization (14; 21.5%), project management (11; 17%), conducting digitization projects (9; 14%), selecting hardware/software (8; 12%), identifying funding sources (8; 12%), and selecting digitization vendors (4; 6%). This data demonstrates that while some institutions are technologically ready to digitize, a need for training, policy, guidelines, and other resources prevents them from moving forward with projects.

Since the Needs and Resources Survey was conducted, a number of South Carolina institutions have started their own digital collections, including Georgetown County Public Library.

### **Target Group**

This project specifically targets special collections, archives, academic libraries, public libraries, state government, repositories, and other cultural heritage institutions interested in providing users wider access to their resources and collections through digital libraries, but either cannot move forward or are moving forward slowly in the development of their projects because of a need for training, policy, guidelines, and/or resources. SCDC intends to have all institutions that are interested in developing digital collections, including the 65 survey respondents, collaborate in this project in some fashion.

The development and enhancement of the above target group's capacity to provide digital library services to their respective communities allows the SCDC to focus on and extend services to a second target group: the citizens of South Carolina. While these citizens are the primary audience for SCDC's end-product, that end cannot be met without significant commitment of resources to the former target group.

### **Distribution**

The primary vehicle for the distribution of SCDC's services will continue to be the organization's web site, [www.scmemory.org](http://www.scmemory.org). The web site will serve as a hub for both public users and partner institutions. Public users will be provided with access to the digital cultural heritage objects aggregated in the SCDC database and K-12 lesson plans. The digital objects will be presented in an instructionally scaffolded manner (e.g., thematic grouping) for the purpose of guiding the user through the collections and of helping the user build cognitive relationships amongst the different collections and individual objects. Partner institutions will be provided with guidelines,

standards, updates, and any other information necessary for the completion of a digital project. SCDC's services to partner institutions are also physically distributed across the state in the form of the three regional scanning centers.

## **Communication**

SCDC's communication plan aims to elicit the following specific responses: to heighten SCDC's target groups' awareness of the project, to raise the visitation statistics of the collections, and to generate a broader interest in developing project proposals from institutions across the state. Besides the web site, the primary communication tool used by SCDC will be its listserv, to which nearly 100 members are currently subscribed. Project updates, professional advice, guidelines revisions, appeals for proposals, and working group correspondence will all be elements of listserv communication. Another element of the communication plan involves a full-scale effort to network SCDC's online presence, which will involve contacting relevant institutions and requesting that SCDC's web site be linked on their web site. This online link networking will serve two purposes: to expose the users of the relevant institutions' web sites to SCDC, and to improve upon SCDC's page rankings in the Google search engine. A professional blog maintained by an SCDC staff member could be effective in rounding out SCDC's online communication strategy.

SCDC's operations will also be documented through professional publications, a precedent which has already been set by an article<sup>1</sup> appearing in *The Journal of Electronic Resources Librarianship* in Fall 2008, and through a presence at state conferences (such as SCLA, SCAA, SCHA, CALM, and PALMCOPP). The SCLA Roundtable on Digitization will also serve as a communication forum for the SCDC. Reaching a wider public audience would involve soliciting *The State* newspaper or SC-ETV to cover SCDC activities of particular interest to the state.

## **Organizational Structure 2007-2008**

To begin the state-wide digital collections initiative, the SCDC will take advantage of current resources around the state. College of Charleston, Clemson, and USC have the same Digital Asset Management System, CONTENTdm, as well as devoted staff and office space for digitizing collections. They have agreed to open their doors as scanning centers in the state to assist other institutions in their projects. The USC Digital Collections Librarian, Clemson Digital Initiatives Librarian, and College of Charleston Archivist are currently the directors of the SCDC and each represents their institution's region, Upstate, Midlands, and Low Country. PASCAL has a part-time student to assist the directors and has generously made some funding available. The State Library has provided an LSTA grant to purchase equipment and staffing for the scanning centers.

With the support from the three universities and PASCAL, it is easy to add the multi-site license for CONTENTdm, which can tie the three databases together in a seamless manner. This will allow users to search the multi-site software from the SCDC web site and find materials from all

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1 Vinson, Christopher G. and Boyd, Kate Foster. "Humpty's Hatching: Nurturing the South Carolina Digital Library into a Reality." This article documents the historical foundations of the South Carolina Digital Collections and its potential to become a powerful research tool for the state.

three institutions. The three scanning centers and staff can be available to outside institutions to receive assistance, either for scanning, metadata, and loading to the database, or any level of assistance they would like. Currently the part-time student from PASCAL assists on creating and maintaining the web site and creating the policies for the program.

Through the 2007-2008 LSTA grant, the SCDC will assist three pilot projects in getting their collections up on the site and three teachers in creating lesson plans for digital collections. The three pilot projects are from USC Beaufort Library, Beaufort County Library, and the Greenville County Public Library System. These three projects will demonstrate the best ways for SCDC and the scanning centers to work with outside institutions.

Also, this year policies and plans will be put in place and made available for the procedures in creating new digital collections and working with institutions other than USC, Clemson, and College of Charleston. Already, scanning and metadata guidelines are available from the SCDC web site, as well as the collection policy. Working Groups, made up of people from institutions all over the state will be established, so that a broad group of S.C. archivists and librarians will be represented and their ideas heard by the SCDC.

To date, the three largest 4-year academic institutions in the state, Clemson University, College of Charleston and the University of South Carolina (Columbia), have each made a commitment to establish three scan centers in the Upstate, Lowcountry and Midlands Regions, respectively. These scan centers house equipment for use by partner institutions throughout the state of South Carolina and will serve as the clearinghouse for South Carolina Digital Collections efforts. The following models for participation are suggested:

#### *Model One*

- 1) Work with one of the scan centers to have materials digitized at the center.
- 2) Partner institutions will provide descriptive metadata in format deemed acceptable by the scan center (spreadsheet, etc.).
- 3) Scan Center will provide technical/preservation metadata – data digital, scan specifications, etc.
- 4) Images and metadata will be loaded into CONTENTdm by the scan center and made available for review to partner institutions.
- 5) Once approved, content will “go live” and will become part of the South Carolina Digital Collections.
- 6) Digital masters will be preserved by the scan center and will be part of a digital preservation network.

#### *Model Two*

- 1) Receive SCDC digitization training to be offered on-demand up to 3 times per year.

- 2) Purchase equipment for digitization; Hire, repurpose or use current staff to digitize material.
- 3) Coordinate digitization activities with regional scan center to assure time is allotted for your project.
- 4) Provide all SCDC required metadata elements to regional scan center in format deemed acceptable by scan center (spreadsheet, etc.).
- 5) Images and metadata will be loaded into CONTENTdm by the scan center and made available for review to partner institutions.
- 6) Once approved, content will “go live” and will become part of the South Carolina Digital Collections.
- 7) Digital Masters will be preserved by the scan center and will be part of a digital preservation network.

In Model One, no fees will be collected for digitization performed by the scan centers when external funding is available (LSTA, IMLS, NEH, NHPRC, etc.). When funding is not available, scan centers will charge minimal fees for digitization in an effort to recover costs. Fee schedules are set by each scan center and vary depending on scale and condition of the material to be digitized. When the scan center is not capable of digitizing the proposed material, an outsourcer or another scan center may be used. For example, an institution in the Low Country would like to digitize a collection of historic maps and the College of Charleston scan center does not have the ability to digitize oversized materials, but the Clemson University scan center does. College of Charleston will contract with Clemson to complete the digitization and preservation/technical metadata for this project. Completion of the project can be performed by either scan center, depending on arrangement.

### **Organizational Structure 2008 –**

The next steps for SCDC to become a successful program are to have a CONTENTdm license just for SCDC, a full time project manager, a digital preservation plan in place, an LSTA re-grant program for digital projects in the state, and federal grant proposals in the pipeline to support larger collaborative projects. Furthermore, teachers need to be able to get continuing education credit for creating lesson plans for the digital collections. This will give them incentive to use the collections in the classroom.

Ultimately, a project manager would organize, coordinate, and manage the SCDC by maintaining the web site and working with institutions on helping them get their digital projects done. This person would help with LSTA funding and making sure the institutions followed the set SCDC guidelines for digital projects. He or she would work on outreach, promoting the website and work with teachers on the lesson plans. He or she would also help find funding for large collaborative digital projects.

The project manager would be charged with his or her duties by the three regional scanning directors, all of whom carry vast expertise in the field of digital project practices and

management. The three directors would serve as an advisory committee that oversees and approves any and all SCDC operations and expenditures. The project manager would report directly to the advisory committee.

USC, Clemson, and College of Charleston would remain the scanning centers and their staff would assist the other institutions in their region with scanning, metadata, and loading. All institutions would be responsible for creating their own web sites for their digital collections, but all collections scanned for SCDC would be accessible from the SCDC web site.

Clemson University has offered to preserve the digital images that are created at their scanning center. It is SCDC's goal to have each scanning center location offer preservation of digital content, which of course would require a fair amount of server storage space. Any digital preservation initiative considered by SCDC would require a thorough survey of current preservation methods, such as LOCKSS, and a determination of which strategy would best serve the interests of SCDC and its partners.

## **Operations**

As of Spring 2008, SCDC's primary operation runs out of the Digital Collections Center at Thomas Cooper Library. Two regional sites, Clemson and College of Charleston, are also a part of these operations as scanning centers that serve their immediate regions. In terms of equipment, SCDC maintains three computer workstations, a laptop, three scanners, and a server. SCDC's central web site is hosted on the PASCAL server. SCDC's management and staff consists of a project director, two regional assistant directors, and an assistant to the project director. No SCDC employee is full-time.

## **Pricing & Financial Plans**

The following financial plan demonstrates the costs necessary to support the South Carolina Digital Collections and create a solid foundation for sustainable growth beyond FY-2009. The SCDC currently operates on LSTA sub-grant funds awarded by the SC State Library, contributions from PASCAL and the USC School of Library and Information Science, and cost-shares from USC, College of Charleston, and Clemson University.

### Initial Costs

2007\*

\$14,890 - 3 scanners, 3 workstations

\$3,457 – Server for CONTENTdm multi-site license

\$3,545 – Travel for scanning center trainings at Clemson and College of Charleston, registration for online training workshop, one day SOLINET training for CONTENTdm

\*Costs recovered in LSTA Sub-grant FFY 2007

2008\*

\$18,800 - Server and CONTENTdm License for SCDC

\$13,040 – CIO operating costs



\*To be purchased with PASCAL funds

Recurring Costs per annum

*Staffing*

\$54,500 – Project Manager salary

\$16,731 – Project Manager benefits package (at 30.7% of salary)

\$46,000 – Full-time programmer/systems administrator

\$14,122 – Programmer benefits package (at 30.7% of salary)

\$36,000 – 3 Student staff scanning technicians at \$12.00/hr, 20/hr a week, 50 weeks a year

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**\$167,353 – Total staff expenses**

*CONTENTdm Annual Maintenance Agreements*

\$1,900 Annual Maintenance Agreement for CONTENTdm License – starting in '09

\$5,000 Annual Maintenance Agreement for CONTENTdm Multi-Site License

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**\$6,900 total for AMAs**

*Professional Development, Travel, Materials Transport*

\$1,000 - Registration costs to 2 conferences in South Carolina, 2 conferences outside of South Carolina.

\$353.00 – Round-trip vehicle travel costs for 2 South Carolina conference attendances. Based on the following model: 350 miles total for round trip travel, \$0.505 per mile based on the national standard set by the Internal Revenue Service in November 2007. This rate is subject to change.

See <http://www.irs.gov/pub/irs-drop/rp-07-70.pdf> for more information on the national mileage reimbursement standard.

\$300.00 – Board for 2 nights at each state conference

\$2,000 – Air transportation to 2 conferences outside of South Carolina

\$500.00 – Board for two nights at each national conference

\$2,000 – Travel to scanning centers, project partner sites, and material transport costs

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**\$6,153 – Total travel expenses**

*Equipment, Technology, and Storage*

\$13,040 – CIO operating costs for server housing and maintenance

\$1,000 - Wear and tear on scanners

\$1,000 – Wear and tear on computers

\$75.00 - CDs and DVDs (SCDC will not sponsor archival storage of TIFFs or JPEGs in the near future). A yearly cycle will use 100 CDs and 50 DVDs.

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**\$15,115 Total equipment, technology, and storage cost**

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**\$195,521 Total recurring costs *per annum***

**Costs Not Included**

- digital collection projects funded by LSTA grants
- storage costs for archiving master files
- web server space for SCDC site