Agenda

- Vision and Planning
- Selection for Digitization
- Outsourcing
Vision

- Establish a vision (mission)
- Focus on what you are trying to accomplish
- Don’t get bogged down in the details now
Planning: Audience and Users

- Important to define audience
  - General user or visitor
  - K-16 and Life Long Learning
  - Practitioners
  - Researchers & Scholars
  - Business Community

- How will the digital materials be used?
Planning: Audience and Users

- Communication with your audience
- Seek input from the users
- Anticipate future uses
Planning: Define Goals/Objectives

- Set SMART objectives
- Change will cause you to revise
- Beware of scope creep
- Document changes during the life of the project
Selection: Collection Development
Materials Selection

● Write a selection policy
  ✤ A collection policy for digitization

● You need to identify a method/process of selection
  ✤ Consistent
  ✤ Clear
  ✤ Flexible
  ✤ Defendable
Selection Policy/Criteria

- Consider
  - What is the purpose of the digitization effort?
  - What is the focus of the digitization effort?
    - Topics, areas of emphasis, subjects, people, timeframes, geographic area
  - Audience needs?
Materials Selection

- Selection is based on your audience and collections
- Labor intensive
- Consider handling time
- Preservation needs?
- Value?
Selection – Elements to Consider

- Whole collections or samples
- Condition
- One or many collections
- Similar items – Themes
- Finding aids?
- Do you want to use digitization to ease workflow
Selection – Technical Ability

● “Scannable”
  ✩ What equipment do you have and what kinds of materials can it accommodate? OR, will you consider outsourcing?
  ✩ Manuscript material – can you accommodate transcripts? Is OCR an option? Will it scan well?
  ✩ Volume: how much material can you accommodate in house? OR, will you consider outsourcing?
Creating a Selection Policy

- Why do we want to scan this?
  - Revert to mission!
- Will it help our users?
- Will it help our staff?
- Are there technical or preservation restrictions?
Digitization for Preservation?

- Digitization is an excellent tool for increasing access to resources
- Digitization is NOT necessarily a preservation medium
- Digital access can preserve original through reduced handling
- Can use the project to accomplish preservation tasks
Legal Issues

- Copyright vs. ownership
- Digital rights
- Donor holds rights?
- Revisit deeds of gift
- Special consideration
  - Photographs, personal letters, diaries
  - NAGPRA
  - Music

http://copyright.cornell.edu/resources/publicdomain.cfm
Copyright Term and the Public Domain in the United States

1 January 2013

Never Published, Never Registered Works

<table>
<thead>
<tr>
<th>Type of Work</th>
<th>Copyright Term</th>
<th>What was in the public domain in the U.S. as of 1 January 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unpublished works</td>
<td>Life of the author + 70 years</td>
<td>Works from authors who died before 1943</td>
</tr>
<tr>
<td>Unpublished anonymous and pseudonymous works, and works made for hire (corporate authorship)</td>
<td>120 years from date of creation</td>
<td>Works created before 1893</td>
</tr>
<tr>
<td>Unpublished works when the death date of the author is not known</td>
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Works Registered or First Published in the U.S.

<table>
<thead>
<tr>
<th>Date of Publication</th>
<th>Conditions</th>
<th>Copyright Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before 1923</td>
<td>None</td>
<td>None. In the public domain due to copyright expiration</td>
</tr>
<tr>
<td>1923 through 1977</td>
<td>Published without a copyright notice</td>
<td>None. In the public domain due to failure to comply with required formalities</td>
</tr>
<tr>
<td>1978 to 1 March 1989</td>
<td>Published without notice, and without subsequent registration within 5 years</td>
<td>None. In the public domain due to failure to comply with required formalities</td>
</tr>
<tr>
<td>1978 to 1 March 1989</td>
<td>Published without notice, but with subsequent registration within 5 years</td>
<td>70 years after the death of author. If a work of corporate authorship, 95 years from publication or 120 years from creation, whichever expires first</td>
</tr>
</tbody>
</table>
# Sound Recordings Published in the United States

<table>
<thead>
<tr>
<th>Date of Fixation/Publication</th>
<th>Conditions</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Fixed prior to 15 Feb. 1972</td>
<td>None</td>
<td>Subject to state statutory and/or common law protection. Fully enters the public domain on 15 Feb. 2067.</td>
</tr>
<tr>
<td>15 Feb 1972 to 1978</td>
<td>Published without notice (i.e., year of publication, and name of copyright owner)</td>
<td>In the public domain.</td>
</tr>
<tr>
<td>15 Feb. 1972 to 1978</td>
<td>Published with notice</td>
<td>95 years from publication. 2068 at the earliest.</td>
</tr>
<tr>
<td>1978 to 1 March 1989</td>
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</tr>
<tr>
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<td>Published with notice</td>
<td>70 years after death of author, or if work of corporate authorship, the shorter of 95 years from publication, or 120 years from creation. 2049 at the earliest.</td>
</tr>
<tr>
<td>After 1 March 1989</td>
<td>None</td>
<td>70 years after death of author, or if work of corporate authorship, the shorter of 95 years from publication, or 120 years from creation. 2049 at the earliest.</td>
</tr>
</tbody>
</table>

# Sound Recordings Published Outside the United States

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<th>Prior to 1923</th>
<th>None</th>
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<tbody>
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<td>1923 to 1 March 1989</td>
<td>In the public domain in its home country as of 1 Jan. 1996 or there was US publication within 30 days of the foreign publication (but see special cases)</td>
<td>Subject to state common law protection. Enters the public domain on 15 Feb. 2067.</td>
</tr>
<tr>
<td>1923 to 15 Feb. 1972</td>
<td>Not in the public domain in its home country as of 1 Jan. 1996. At least one author of the work was not a US citizen or was living abroad,</td>
<td>Enters public domain on 15 Feb. 2067.</td>
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Outsourcing
Outsourcing

● What is outsourcing?
  ✤ **Outsourcing** is subcontracting a process, such as product design or manufacturing, to a third-party company – Wikipedia

● What can you outsource?
  ✤ Digitization
    ● Different media types
  ✤ Metadata
  ✤ Web design
  ✤ Hosting (repositories)
Why Outsource?

- No “right” answer
- Consider the pros/cons within the context of your:
  - Project
  - Needs
  - Equipment
  - Timelines
  - Original materials
  - Funding
  - Digital preservation
In House or Outsourcing: Considerations

- Is your organization committed to ongoing digitization? Or, is this a one-time project?
- Does the original source material require specialized equipment?
- You can outsource particular components
In-House Pros and Cons

● Pros
  ✶ Develop experience and knowledge
  ✶ More control over the process and materials
  ✶ Requirements can be adjusted as you go

● Cons
  ✶ Large initial and ongoing investment
  ✶ Longer implement
  ✶ Limited production capability
  ✶ Expertise not always available
Outsource Pros and Cons

● Pros
  ✴ Less investment
  ✴ On-site expertise
  ✴ Less risk to the organization; vendor absorbs cost of technology obsolescence, failures, downtime, etc.

● Cons
  ✴ Less control of process and quality
  ✴ Complex contractual process; specs must be clearly defined at the beginning; problems must be negotiated
  ✴ Loss of physical control over the source materials
Some Quick Criteria

- **In house**
  - Clear project
  - Expertise in house
  - Equipment in house

- **Outsource**
  - Controlled, up front cost
  - Aggressive/strict timeline
Vendor Relations

The vendor will need to know:

- Definition of an “item” or “document”
- How many items there are
- Are the items bound or unbound?
- Page dimensions
- Handling specifications
- Insurance requirements
Which is a newspaper?

How do you count them?
Vendor Relations

The vendor will also need to know:

- Specifications for the digitization
- Resolution
- Tonality (bitonal, grayscale, color)
- File format(s)
- Is compression acceptable
- Directory and file naming requirements
- Indexing and metadata requirements
- Delivery medium and quantity
What the Vendor Wants

- Clear picture of project
  - They can work with what you have
  - Clearer you are – better they can respond, otherwise they make decisions/options
  - Difficulties with comparisons

- What is quality control?
- What is high quality?
- What is preservation standards?
- What is metadata?
Consider: Planning

- Outsourcing does NOT replace planning
- Still need clear mission, goals, standards
  - Doing for preservation?
- Remember:
  - Documentation of what done in house/outsource, especially when combination
Consider: Costs

- Actual digitization and other services
  - Included or separated out?
    - Digitization
    - Quality control
    - Metadata
  - Staff time to prepare, receive, review
  - Transportation costs
Consider: Needs

Everyone wants

- Fast
- High quality
- Inexpensive
Final Thoughts

- Decide on mission early on
- It will help you at every stage
- Determine selection criteria
- The quality of your response from a vendor is contingent upon the quality of your request.
- Either option will require management, oversight, and knowledge about digitization
Questions?

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