



INLS 752: Digital Preservation and Access

The Instructor.

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Office Hours.

I will be in my office after class 4:45-5:30 most Tuesdays. If I am not in when you drop by at other times please email me. Also feel free to call me at home in the evening before 9:00 PM.

Course Timeline.

First Class: Tuesday, August 22, 2016

Last Class: Tuesday, December 5, 2016

Brief Course Description.

This course focuses on integrating state-of-the-art information technologies, particularly those related to the digital curation lifecycle, digital repositories, and long-term digital preservation, into the daily operations of archives, records centers, museums, special collections libraries, visual resource collections, historical societies, and other information centers. Issues, topics, and technologies covered will include the promise & challenge of long-term digital preservation and curation; creating durable digital objects, approaches to preservation; development of institutional repositories; image processing; selecting materials for digitization and managing digitization projects; resource allocation and costing, risk management, digitization and metadata; rights management and other legal and ethical issues; digital asset management; standards; file formats; quality control; funding for developing and sustaining digitization projects and programs; and trusted repositories.

Goals and Objectives.

By the end of the course, the student should be able to:

- ✚ Identify the key events in the history of digital preservation and access.
- ✚ Define and apply essential terminology related to digital preservation.
- ✚ Distinguish between the concepts underlying digital preservation and digital curation.
- ✚ Understand the digital curation lifecycle from conceptualization through disposition.
- ✚ Understand the primary issues and challenges with digital preservation and curation activities.
- ✚ Demonstrate familiarity with a variety of digital preservation and curation projects worldwide.
- ✚ Identify standards that are important to the digital curation lifecycle.
- ✚ Identify best practice guidelines and organizations that are creating them for digitization and digital preservation.
- ✚ Discuss the OAIS model and how it fits into the trusted digital repository movement.

- # Discuss what makes a repository “trustworthy.”
- # Identify tools and standards for audit and certification of digital repositories.
- # Be familiar with the development of institutional repositories.
- # Explain the digitization workflow and all the steps involved in major digitization projects.
- # Be familiar with best practice guidelines and organizations that are creating them for digitization and digital preservation.
- # Select materials for digitization projects and provide sound justifications for these selections.
- # Select and justify standards and benchmarks for a given digitization project.
- # Create appropriate metadata for digital objects for access, management, and preservation purposes.
- # Determine the costs of digitization projects and plan appropriate facilities and resources.
- # Understand how to manage a digitization project including assessing risk and establishing a quality control program.
- # Write a well-argued and constructed grant proposal for a digitization, repository building, or digital preservation project.

Assignments & Evaluation.

<i>Assignment</i>	<i>% of Grade</i>	<i>Due Date</i>
Five to Ten Minute Madness Presentation	5%	Aug 29
Preservation Landscape Presentation	10%	September 19
Briefing Paper 1: Digital Image Capture & OCR	10%	October 3
Preliminary Report on Grant Application		Week of October 9
Digital Curation Scenario Presentations	10%	October 31
Briefing Paper 2: Interview	15%	November 7
Grant Presentation	5%	November 21
Grant Proposal	25%	November 28
Review of Proposals	5%	December 3 by 5:00 PM
Class Participation	15%	On-going
Total	100%	

A summary of each of the assignments is below; for more detailed descriptions of the Briefing Paper assignments and the overall Grant Assignment (Progress Report, Presentation, and Proposal), see the Detailed Course Assignments handout.

Five to Ten Minute Madness

This assignment is designed to 1) get you into the day-to-day realities of digital curation issues and see how these apply in the workplace; and 2) give you experience presenting to a group. As a member of the Disco Tech Institutional Repository (DTIR) team you will present on current perspectives in the media regarding

digital preservation to your colleagues. Find an item in the popular press (newspaper, magazine, blog, etc.) that discusses some aspects of digital preservation or curation and create a 10-minute presentation.

Preservation Landscape

Each student will present on a national or international research/development project in digital curation or preservation. Everyone will make 5-10-minute presentation with 1-2 slides.

Briefing Papers

For the Briefing Paper assignments please apply some of the concepts and challenges discussed in the course:

- For Briefing Paper 1, students will digitally capture two document types and comment on the results and experience.
- For Briefing Paper 2, students will contact a library, archives, or museum professional who is working on digitization, institutional repositories, or other digital preservation and access projects and interview them regarding “lessons learned” and write this up as a brief paper.

Digital Curation Scenarios

The intent of this assignment is to introduce real world, practice-based digital curation challenges and issues. Each entry presents a specific scenario (see assignment handout). Several of these are derived from Curate: The Digital Curator Game.¹ Students will select a scenario, prepare a brief written response, and present this to the class.

Grant Project

Proposal writing, project design, and project management are some of the most highly sought after skills an information professional can possess today, particularly in the field of digital curation. As a result, this assignment was designed to provide students with experience in project planning and grant writing. Project planning and proposal writing is not an individual task; rather it necessitates a collaborative, team-approach. For this assignment, students will form teams of two or three. Each team will develop a proposal relevant to digital preservation and curation and will prepare a submission-worthy grant proposal. The semester-long, team project will be evaluated at three stages: 1) Progress Report, establishing your work plan and task assignments for completing your team’s grant proposal (Week of October 11); 2) Grant Presentation, a 20-minute group presentation of your team’s grant proposal to your classmates (November 21), with five minutes for Q&A; and 3) your team’s completed Grant Proposal (November 28).

Class Participation

I expect students to participate in class discussions on the readings and webcasts and to pose questions about those readings and about the course content. The purpose of the discussions is to help students to think critically about issues and challenges related to digital preservation and access, and to address ways that the literature may affect practice. Your responsibilities are to be prepared for class each day through reading and reflecting on the required readings assigned for that particular session. It is also helpful, when preparing for class, to consider how that session’s particular theme and readings may apply to your area of professional interest. You are also encouraged to share current news and events you find informative to issues of digital preservation and access, both in-class as well as on Sakai. See Class Policies, below, for additional guidance on class participation.

¹ For the game, see: <http://www.digcur-education.org/eng/Resources/CURATE-Game>

Assignment Nomenclature

Please turn in all assignment through Sakai and provide a printed version in class. For all assignments please save your file as “lastname_assignment_752.docx” (where “assignment” is the assignment name). Please turn in all assignments as word documents if possible. **Please put your name and page number on the top of each page of your assignments as well.**

Graduate Grading Scale. (Pluses and minuses not given for semester grades thus a semester P is 80-94 inclusive)

- H (95-100): "Clear excellence," superior work: complete command of subject, unusual depth, great creativity or originality; above and beyond what is required
- P+ (90-94): Above average performance: solid work somewhat beyond what was required and good command of the material
- P (85-89): Satisfactory performance that meets course requirements (expected to be the median grade of all students in the course)
- P- (80-84): Acceptable work in need of improvement
- L (70-79): Unacceptable graduate performance: substandard in significant ways
- F (< 70): Performance that is seriously deficient and unworthy of graduate credit
- IN: Work incomplete (only given under extreme circumstances, such as serious illness)

Penalty for Late Assignments.

I expect you to pass assignments in on time. This is important for at least two reasons: 1) the need to meet deadlines is a reality of professional life, and 2) giving some people more time for an assignment than others in the class is not equitable. However, life happens to all of us at one time or another. If you cannot meet an assignment deadline, please tell me why PRIOR to class. I will negotiate a new deadline with anyone who has a valid reason for needing this (i.e., NOT “I just didn’t get it done.”). Otherwise, late assignments will drop 3 points for each day late.

Course Activities & Readings.

Course activities include readings, videos, discussion, and assignments. Discussion will take place in the classroom as well as through the class website on Sakai. There is no textbook for class. The assigned readings and webcasts are available on the Web, through UNC Libraries’ E-Research Tools, or on the class website on Sakai. While there is no required textbook for this class, the following out of print book has been placed on reserve in the SILS Library: Kenny, Anne R. & Oya Rieger. *Moving Theory into Practice*. Mountain View, CA: RLG, 2000.

All required readings are listed in the Course Outline section of this syllabus, as are optional readings for each class session. Additionally, please see the Course Supplement for additional resources complementing our required course and optional readings. You are expected to read all required readings before the start of the class session for which these readings are assigned; you may choose to read the optional readings for the particular class session as well, though this is not a requirement. Optional readings are provided to encourage and develop understanding of topics of particular interest to you. **Required readings are in bold.**

Academic Policies.

By enrolling as a student in this course, you agree to abide by the University of North Carolina at Chapel Hill policies related to the acceptable use of online resources. Please consult the Acceptable Use Policy on topics such as copyright, net-etiquette, and privacy protection.

As part of this course, you may be asked to participate in online discussions or other online activities that may include personal information about you or other students in the course. Please be respectful of the rights and protection of other participants under the UNC-Chapel Hill Information Security Policies when participating in online classes.

When using online resources offered by organizations not affiliated with UNC-Chapel Hill, such as Google or YouTube, please note that the terms and conditions of these companies and not the University's Terms and Conditions apply. These third parties may offer different degrees of privacy protection and access rights to online content. You should be well aware of this when posting content to sites not managed by UNC-Chapel Hill.

When links to sites outside of the unc.edu domain are inserted in class discussions, please be mindful that clicking on sites not affiliated with UNC-Chapel Hill may pose a risk for your computer due to the possible presence of malware on such sites.

Honor Code & Class Conduct.

Honor Code:

*The University of North Carolina at Chapel Hill has had a student-administered honor system and judicial system for over 100 years. The system is the responsibility of students and is regulated and governed by them, but faculty share the responsibility. If you have questions about your responsibility under the honor code, please bring them to your instructor or consult with the office of the Dean of Students or the Instrument of Student Judicial Governance. This document, adopted by the Chancellor, the Faculty Council, and the Student Congress, contains all policies and procedures pertaining to the student honor system. **Your full participation and observance of the honor code is expected.***

This class follows the UNC Honor System. Information on the Honor Code can be found at: <http://honor.unc.edu/>. Please read The Honor System's Module at: <http://studentconduct.unc.edu/students/honor-system-module> to become familiar with the UNC Honor Code and to understand the rights and responsibilities defined therein.

The Instrument of Student Judicial Governance, (<http://instrument.unc.edu/>) which contains the provisions of the Honor Code, states that students have four general responsibilities under the Code:

1. Obey and support the enforcement of the Honor Code;
2. Refrain from lying, cheating, or stealing;
3. Conduct themselves so as not to impair significantly the welfare or the educational opportunities of others in the University community; and
4. Refrain from conduct that impairs or may impair the capacity of University and associated personnel to perform their duties, manage resources, protect the safety and welfare of members of the University community, and maintain the integrity of the University.

The Instrument (<http://instrument.unc.edu/>) prohibits giving or receiving unauthorized aid on examinations or in the completion of assignments. **The Honor Code defines plagiarism as "deliberate**

or reckless representation of another's words, thoughts, or ideas as one's own without attribution in connection with submission of academic work, whether graded or otherwise." *Whenever you use the words or ideas of others, this should be properly quoted and cited.* You should adopt a style guide – e.g., American Psychological Association, Chicago Manual of Style, MLA, or Turabian – and use it consistently. (I do not care which one you select!) Students who are discovered attempting to take credit for work performed by others will be referred to the Honor Court for resolution.

Please include the following pledge on all submitted work: “On my honor, I have neither given nor received unauthorized aid on this assignment.”

Accommodations or Special Needs

If you feel you may need an accommodation for a disability or have any other special need, please contact me. I will best be able to address special circumstances if I know about them early in the semester.

Diversity Statement:

“In support of the University’s diversity goals and the mission of the School of Information and Library Science, SILS embraces diversity as an ethical and societal value. We broadly define diversity to include race, gender, national origin, ethnicity, religion, social class, age, sexual orientation, and physical and learning ability. As an academic community committed to preparing our graduates to be leaders in an increasingly multicultural and global society we strive to:

- Ensure inclusive leadership, policies and practices;
- Integrate diversity into the curriculum and research;
- Foster a mutually respectful intellectual environment in which diverse opinions are valued;
- Recruit traditionally underrepresented groups of students, faculty and staff; and
- Participate in outreach to underserved groups in the State.

The statement represents a commitment of resources to the development and maintenance of an academic environment that is open, representative, reflective and committed to the concepts of equity and fairness.”
~The faculty of the School of Information and Library Science

Class Policies:

- Be considerate of others in using reserve and other materials, returning them promptly and in good condition.
- Be considerate of your classmates by arriving to class on time, with cell phones turned off for the duration of the class period. Unexcused/unexplained tardiness may impact your class participation grade.
- Additionally, be considerate of your classmates by informing instructor of any planned absences. Unexcused/unexplained absences may impact your class participation grade.
- Be prepared for each class by completing the assigned reading, enabling you to ask questions and participate in class discussion.
- Be an active and positive participant in class, characterized as:
 - Having a clear command of the readings for the day;
 - Sharing analyses and opinions based on the readings;
 - Allowing other students the opportunity to participate; and
 - Freely agreeing and disagreeing with others when warranted.
- Please note: An intellectual exchange of ideas is the cornerstone of education, but any criticism should be limited to an idea and not the person specifically.

- Turn in assignments by or at the beginning of the class session on which the assignment is due.

As the Semester Begins....

1) If you are not familiar with Photoshop, go to the SILS Lab as there are Photoshop books on reserve. It is generally a useful program with which to be familiar if you are digitizing materials and mounting on the Web. We will not, however, cover how to use it in this class. The bookstore has several beginning and advanced books on this topic and there are websites with tutorials (some quite advanced) such as [Planet Photoshop](#) and Lynda.com.

2) Go to Cornell University Library's Preservation Department's website and run through the *Moving Theory into Practice* Online Tutorial. <http://www.library.cornell.edu/preservation/tutorial/contents.html>. Most of this is assigned throughout the semester, but it will give you a bit of an overview introduction if you do it up front before the heavy work of the semester starts. You will also be using the Cornell tutorial on Digital Preservation Management. <http://www.library.cornell.edu/iris/tutorial/dpm/index.html>.

Weekly Course Calendar

THEME: COURSE OVERVIEW & INTRODUCTION TO DIGITAL PRESERVATION & CURATION SESSIONS 1 - 3

1. Tuesday, August 22: Introduction & Digital Curation.

Objectives:

- Students will be able to identify goals of the course and understand requirements, readings, assignments, and expectations.
- Students will be able to identify the framework for course, based on:
 - Matrix of Digital Curation Knowledge and Competencies: <http://ils.unc.edu/digccurr/digccurr-matrix.html>
 - Digital Curation Lifecycle Model: <http://www.dcc.ac.uk/docs/publications/DCCLifecycle.pdf>
 - Higgins, Sarah. "The DCC Curation Lifecycle Model." *International Journal of Digital Curation*, Vol 3, No 1 (2008). <http://www.ijdc.net/index.php/ijdc/article/view/69>.
 - H.R. Tibbo, C. Hank, C.A. Lee, & R. Clemens (Eds.), *Proceedings of DigCCurr2009: Digital Curation: Practice, Promise, and Prospects*, April 3-5, 2009, Chapel Hill, NC, 2-3. Chapel Hill, NC: School of Information and Library Science, University of North Carolina at Chapel Hill. Available as free download at: <http://stores.lulu.com/DigCCurr2009>. (Browse)
 - Continuum Model: <http://john.curtin.edu.au/society/australia/> (Browse site and summarize Continuum Model).
 - OAIS Reference Model:
 - CCSDS 650.0-M-2: Reference Model for an Open Archival Information System (OAIS). Magenta Book. June 2012. [This Recommendation has been adopted as ISO 14721:2012. <http://public.ccsds.org/publications/archive/650x0m2.pdf>. (If the site asks for user name and password just click cancel and it will bring up the document anyway.)
- Introduction to the class, instructors, and students. We will discuss how we want to conduct the class and the nature of the assignments and the expectations of all of us. What do we value in class participation?
- **View the video, Digital Preservation and Nuclear Disaster: An Animation:** <http://www.youtube.com/watch?v=pbBa6Oam7-w>
- Framework for semester. Lifecycle Approach: Overseeing digital assets across their lifecycles from planning and resource allocation through creation, management, delivery, preservation, and reuse.
 - ✚ Bailey, Charles. "Digital Curation Resource Guide." 2014. https://archive.org/details/DigitalCurationResourceGuide_514 (Browse)
 - ✚ Bailey, Charles. "Digital Curation Bibliography." <http://digital-scholarship.org/dcbw/dcb.htm> (Browse)
 - ✚ Continuum Model: <http://john.curtin.edu.au/society/australia/>

- ✚ DCC Curation Lifecycle Model.
<http://www.dcc.ac.uk/docs/publications/DCCLifecycle.pdf>.
 - ✚ DCC. “The Value of Digital Curation.” <http://www.dcc.ac.uk/digital-curation>
 - ✚ Higgins, Sarah. “The DCC Curation Lifecycle Model.” *International Journal of Digital Curation*, Vol 3, No 1 (2008). <http://www.ijdc.net/index.php/ijdc/article/view/69>.
 - ✚ Lee, Christopher. Matrix of Digital Curation Knowledge and Competencies:
<http://ils.unc.edu/digccurr/digccurr-matrix.html>
 - ✚ Lee, Christopher A., Helen R. Tibbo, and John C. Schaefer. “Defining What Digital Curators Do and What They Need to Know: The DigCCurr Project.” Proceedings of the *ACM IEEE Joint Conference on Digital Libraries*. June 18-23, 2007: Vancouver, British Columbia, Canada.
http://www.ils.unc.edu/digccurr/jcdl2007_paper.pdf
- Watch:
- ✚ Horton, Robert. “Preserving Digital Content in the 21st Century.” *YouTube*. April 15, 2009. <http://www.youtube.com/watch?v=UG6AodGkWZs>
 - ✚ Library of Congress. “Why Digital Preservation is Important for Everyone.” *YouTube*. April 1, 2010. <http://www.youtube.com/watch?v=qEmmeFFafUs&feature=related>
 - ✚ Rothenberg, Jeff. “Digital Preservation in Perspective How Far Have We Come and What's Next.” *YouTube* <http://www.youtube.com/watch?v=2Idbur1qR8I> Slides at: <http://www.slideshare.net/FuturePerfect/jeff-rothenberg-digital-preservation-perspective> Prepare a BRIEF list of main points.
- Edwards, Paul. “How to Read a Book.”
<http://pne.people.si.umich.edu/PDF/howtoread.pdf>
- What do we mean by “digital preservation & access” and “digital curation”? See Digital Curation Center (DCC) <http://www.dcc.ac.uk/digital-curation/what-digital-curation>
- Discuss class focus on policy, technology, and resources. Cornell perspective.
- Create Disco Tech Institutional Repository (DTIR) team. Position, brief job description, perspective on digital preservation. Please assume this persona throughout the semester when discussing readings.
- **ASSIGNMENT:** You are a member of the Disco Tech Institutional Repository (DTIR) team. This Tuesday you need to present on current perspectives in the media regarding digital preservation to your colleagues. Find an item in the popular press (newspaper, magazine, blog, etc.) that discusses some aspects of digital preservation or curation that you will present to your colleagues in the library. Please send me the title ASAP as we would like everyone to have a unique item so it will be first sent to me, first claimed. Please prepare 1-2 PowerPoint slides that summarizes the main points of the piece and deposit into the Sakai assignment slot by noon on Monday, August 28th. Everyone will present on their item for no more than 10 minutes - just the main points. We will discuss these at the beginning of Tuesday’s class on August 29. (This is a version of a “Minute Madness” session that is part of many conferences today.)

2A. Tuesday, August 29: Disco Tech Library and Institutional Repository.

We will discuss the staff positions you have developed and will assume throughout the semester.

2B. Tuesday, August 29: Permanence, Terminology, & Fundamental Concepts.

Objective:

- Students will be able to define digital preservation and curation terminology and identify fundamental concepts, with a focus on the notion of “permanence.”
 - Permanence:
 - O’Toole, James M. “On the Idea of Permanence.” *American Archivist* 52 (Winter 1989): 10-25. [*American Archivist* Online via UNC Libraries]
 - Fundamentals:
 - ✚ *Moving Theory into Practice Digital Imaging Tutorial*, Chapter 8: Digital Preservation. <http://www.library.cornell.edu/preservation/tutorial/preservation/preservation-01.html>
 - ✚ *Moving Theory into Practice Digital Imaging Tutorial*, Chapter 1: Basic Terminology. <http://www.library.cornell.edu/preservation/tutorial/intro/intro-01.html>
 - ✚ Glossary of Terms (on Digital Curation) Digital Curation Centre. Browse. <http://www.dcc.ac.uk/resource/glossary/>
-

2C. Tuesday, August 29: Five to Ten Minute Madness.

Students will present to their peers at Disco Tech re preservation and curation issues.

2D. Tuesday, August 29: Digital Preservation and Curation Challenges and Opportunities.

Objective:

- Students will become familiar with some of the risks involved with digital content and some of the opportunities in the digital preservation field.
- Break into DTIR subgroups and come up with a list of key challenges and opportunities (as portrayed in the “popular” press) based on what you found and what you heard. Each group will present their top 3 items in each category.
- Read all of the bolded items and any 5 of the following before class today (most items are short). Also, feel free to add to this list. If you do, please send the class a link to the article.
 - ✚ Bollacker, Kurt. “Avoiding a Digital Dark Age.” *American Scientist* Feb. 19, 2010. <http://www.americanscientist.org/issues/pub/avoiding-a-digital-dark-age/1>

- # Computer History Museum. “Digital Dark Age – Revolution Preview.” YouTube <http://www.youtube.com/watch?v=PSIMzirvsFc>
- # De Aenlle, Conrad. “Digital Archivists, Now in Demand.” *New York Times – Jobs* (February 7, 2009). http://www.nytimes.com/2009/02/08/jobs/08starts.html?_r=2&emc=eta1
- # Dionne, Mimi. “Partnerships New and Old: Preservation in the 21st Century #saa12.” *CSM Wire* August 10, 2012. <http://www.cmswire.com/cms/information-management/partnerships-new-and-old-preservation-in-the-21st-century-saa12-016899.php>
- # Erway, Ricky. *Defining Born Digital*. Dublin, Ohio: OCLC Research, 2010. <http://www.oclc.org/content/dam/research/activities/hiddencollections/borndigital.pdf>
- # Gantz, John, et al. “The Diverse and Exploding Digital Universe: An Updated Forecast of Worldwide Information Growth through 2011.” ICD. March 2008. <http://www.emc.com/collateral/analyst-reports/diverse-exploding-digital-universe.pdf> Read Executive Summary and scan remainder.
- # Gartner Group. “Gartner Identifies Four Information Management Roles IT Departments Need to Remain Effective.” February 1-2, 2010. <http://www.gartner.com/it/page.jsp?id=1282513>
- # Gartner Group. “Gartner Identifies Top Priority Skills for IT Asset Management Leaders.” July 2012. <http://www.gartner.com/it/page.jsp?id=2079215>
- # Gartner Group. “Gartner Says Top 10 Strategic Technologies Will Be Assimilated Into Management Tools.” June 2012. <http://www.gartner.com/it/page.jsp?id=2044716>
- # Psfk. “Museum Will Use Twitter to Gather Public Experience of Olympics.” July 27, 2012. <http://www.psfk.com/2012/07/twitter-museum-olympics.html>
- # Rinehart, Amanda Kay and Patrice-Andre Prud’homme. “Overwhelmed to Action: Digital Preservation Challenges at the Under-resourced Institution.” *OCLC Systems and Services* 30/1 (2014): 28-42.
- # Stuart, Jeffrey. “A New Digital Dark Age.” *World Archaeology* 44/4 (December 2012): 553-570. (UNC Online Journals)
- # Walters, Tyler and Katherine Skinner. *New Roles for New Times: Digital Curation for Preservation*. Washington, DC: Association of Research Libraries, March 2011. http://www.arl.org/storage/documents/publications/nrnt_digital_curation17mar11.pdf Read pages 4 – 29.

➤ Watch:

- Hunter, Greg and Mark Evans. “Webinar: Challenges of Digital Preservation.” *YouTube* November 8, 2011. <http://www.youtube.com/watch?v=lyBWuuXa-hg&feature=related>

3A. Tuesday, September 5: History of Information and Communication Technologies.

Objective:

- Students will be able to identify milestones in information and communication technology development, and the emerging call for digital preservation solutions.

- ✚ Cornell University. "Digital Preservation Management Tutorial: Implementing Short-term Strategies for Long-term Problems." <http://www.dpworkshop.org/dpm-eng/timeline/index.html>
 - Please read "Setting the Stage," look at the timeline, and take the timeline quiz.
 - ✚ Data's Shameful Neglect." *Nature* 461/7261 (September 10, 2009). <http://www.nature.com/nature/journal/v461/n7261/full/461145a.html>
 - ✚ "Digital Archiving: History Flushed." *The Economist* April 28, 2012. <http://www.economist.com/node/21553410>
 - ✚ Hirtle, Peter B. "The History and Current State of Digital Preservation in the United States." In: *Metadata and Digital Collections: A Festschrift in Honor of Thomas P. Turner*. Ithaca, NY: Cornell University, 2010, pp., 121-140. http://cip.cornell.edu/DPubS/Repository/1.0/Disseminate?view=body&id=pdf_1&handle=cul.pub/1238609304.
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3B. Tuesday, September 5: Institutional Repositories.

➤ Institutional Repositories.

- ✚ Albanese, Andrew Richard. "Institutional Repositories: Thinking Beyond the Box." *Library Journal.com* (March 1, 2009). <http://www.libraryjournal.com/article/CA6639327.html>
- ✚ Digital Commons Website. (Browse) <http://digitalcommons.bepress.com/repository-research/61/> (Nice set of links to case studies and articles).
- ✚ Dooley, Jackie M. 2015. *The Archival Advantage: Integrating Archival Expertise into Management of Born-digital Library Materials*. Dublin, OH: OCLC Research, 2015. <http://www.oclc.org/research/publications/2015/oclcresearch-archival-advantage-2015.html>
- ✚ Duranti, Luciana. "The Long-term Preservation of the Digital Heritage: A Case Study of Universities' Institutional Repositories." *Italian Journal of Library & Information Science*, Vol. 1 Issue 1 (June 2010): p157-168. Find through LISA database at: <http://ehis.ebscohost.com.libproxy.lib.unc.edu/ehost/pdfviewer/pdfviewer?sid=ae9d6191-95e7-4323-9c6c-7361cf8c4091%40sessionmgr12&vid=8&hid=120>
- ✚ Kim, Jihyun. "Motivating and Impending Factors Affecting Faculty Contribution to Institutional Repositories." *Journal of Digital Information* (8)2 (2007). <http://journals.tdl.org/jodi/article/view/193/177>.
- ✚ Lynch, Clifford. "Institutional Repositories: Essential Infrastructure for Scholarship in the Digital Age," *ARL Bimonthly Report*, 226 (2003). <http://www.arl.org/resources/pubs/br/br226/br226ir.shtml>
- ✚ Markey, Karen, Soo Young Rieh, Beth St. Jean, Jihyun Kim, and Elizabeth Yakel. *Census of Institutional Repositories in the United States: MIRACLE Project Research Findings*. Washington DC: CLIR, 2007. <http://www.clir.org/pubs/reports/pub140/pub140.pdf>.
- ✚ Registry of open Access Repositories. <http://roar.eprints.org/> Scan.
- ✚ Salo, Dorothea. "Innkeeper at the Roach Motel." *Library Trends* 57:2 (Fall 2008). Available at: <http://digital.library.wisc.edu/1793/22088>.

- # Shreeves Sarah. "On Faculty Outreach." Vimeo (Nov. 2008). <http://vimeo.com/2902879> and "What Are Our Success Factors?" Vimeo (Nov. 2008): vimeo.com/2902905.
- # SPARC. "Repository Resources." <http://www.arl.org/sparc/repositories/>
- # Witt, Michael. "Co-designing, Co-developing, and Co-implementing an Institutional Data Repository Service." *Journal of Library Administration*, Vol. 52 Issue 2 (Feb. 2012): 172-188.

**THEME: YOUR PROJECT
SESSION 4A**

4A. Tuesday, September 12: Grant Writing and Funding Sources.

Objective:

- Students will be able to describe the attributes and requirements for creating a compliant grant proposal, focused on four major areas: defining the project; planning the project; doing the project; and writing the grant application.
- # Flanders, Julie. "Grant Writing on the Web: Resources for Finding and Securing Funding." *College & Research Libraries News* 71/9 (Oct 2010): 472-475, 479.
- # Institute of Museum and Library Services (IMLS). Sample Applications. http://www.ims.gov/applicants/sample_applications.aspx
- # National Archives and Records Administration, National Historic Publications and Records Commission, funding program. <http://www.archives.gov/nhprc/apply/program.html>.
- # National Endowment for the Humanities. <http://www.neh.gov>.

REFERENCE:

- # Carpenter, Julie. *Library Project Funding: A Guide to Planning and Writing Proposals*. Oxford: Chandos, 2008. SILS Z683 .C37 2008. On reserve.
- # Carr, Cynthia E., *The Nuts and Bolts of Grant Writing*. Los Angeles; SAGE, 2015 (Davis, but I have asked to be placed on reserve). HG177.5.U6 C37 2015.
- # MacKellar, Pamela H. *Writing Successful Technology Grant Proposals : A LITA Guide*. New York: Neal-Schuman Publishers, Inc., 2012. SILS Z678.9.A4 U648 2012. On reserve.
- # Miner, Jeremy T. *Models of Proposal Planning & Writing*. Westport, CT: Praeger, 2005. SILS HG177.5.U6 M558 2005. On reserve.
- # Miner, Lynn E., Jeremy T. Miner, & Jerry Griffith. *Proposal Planning and Writing*. 2nd ed. Phoenix, AZ: Oryx, 2005. Browse entire book. HG177.5.U6 M56 2005. On reserve.
- # Pequegnat, Willo, Ellen Stover, & Cheryl Anne Boyce, eds. *How to Write a Successful Research Grant Application: A Guide for Social and Behavioral Scientists*. [electronic resource]. New York: Springer, 2011. Full text available via the UNC-Chapel Hill Libraries.
- # There are several other books available in the UNC Libraries on grant and proposal writing and in the Bullshead Bookstore (Amazon too!).

ASSIGNMENT: Create groups of 4 for term grant writing project. Select what you would like to do as a group for the project.

THEME: THE DIGITAL CURATION LANDSCAPE
SESSION 4B - 5

4B. Tuesday, September 12: Digital Preservation & Longevity: Part I.

Objective:

- Students will be able to describe seminal works describing the historical impetus for programmatic, digital preservation approaches, and recommendations for planning and implementation.
 - ✚ Garrett, John & Donald Waters. “Preserving Digital Information: Report of the Task Force on Archiving of Digital Information.” The Commission on Preservation and Access and RLG, 1996. <http://www.clir.org/pubs/reports/pub63>.
 - ✚ Hedstrom, Margaret. “Digital Preservation: A Time Bomb for Digital Libraries.” *Computers and the Humanities* 31/3 (1997): 189-202. <http://www.uky.edu/~kiernan/DL/hedstrom.html>. (also in UNC Library E-Journals)
 - ✚ Ross, Seamus. “Changing Trains at Wigan: Digital Preservation and the Future of Scholarship.” 2000. <http://www.bl.uk/blpac/pdf/wigan.pdf>.
-

5A. Tuesday, September 19: Digital Preservation & Longevity: Part II.

Objective:

- Students will be able to identify and discuss key works describing the contemporary issues and challenges of digital preservation.
 - ✚ Digital Preservation Coalition. “Mind the Gap: Assessing Digital Preservation Needs in the UK.” 2006. <http://www.dpconline.org/advocacy/mind-the-gap>.
 - ✚ Harvey, Ross. *So Where's the Black Hole in Our Collective Memory? A Provocative Position Paper*. 2008. http://www.digitalpreservationeuropa.eu/publications/position/Ross_Harvey_black_hole_PPP.pdf
 - ✚ Hedstrom, Margaret, et al. “It's About Time: Research Challenges in Digital Archiving and Long-term Preservation.” Washington, DC: NSF & LOC, 2003. http://www.digitalpreservation.gov/multimedia/documents/about_time2003.pdf
 - ✚ Hedstrom, Margaret & Seamus Ross. “Invest to Save: Report and Recommendations of the NSF-DELOS Working Group on Digital Archiving and Preservation.” (Washington, DC: NSF & DELOS, 2003). <http://eprints.erpanet.org/48/01/Digitalarchiving.pdf> Read executive summary, pp. 1-10.
 - ✚ Library of Congress. *Preserving Our Digital Heritage: The National Digital Information Infrastructure and Preservation Program 2010 Report: A Collaborative Initiative of the Library of Congress*. Washington, DC: LOC, 2010. http://www.digitalpreservation.gov/documents/NDIIPP2010Report_Post.pdf Read Executive Summary.
-

5B. Tuesday, September 19: Digital Preservation Landscape: Research and Practice.

- # Library of Congress. Digital Preservation Research.
<http://www.digitalpreservation.gov/partners/research.html> (Read project descriptions)
- # Ross, Seamus. Keynote speech at the European Conference on Digital Libraries (ECDL) 2007. http://www.ecdl2007.org/Keynote_ECDL2007_SROSS.pdf
- # Ross, Seamus and Margaret Hedstrom. "Preservation Research and Sustainable Digital Libraries." *International Journal of Digital Libraries* (2005) 5: 317–324.
- # Stephan Strodl, Petar Petrov, and Andreas Rauber. "Research on Digital Preservation within Projects Co-funded by the European Union in the ICT Programme." May 2011.
http://cordis.europa.eu/fp7/ict/telearn-digicult/report-research-digital-preservation_en.pdf
Read Executive Summary and browse remainder.

➤ Students will each present on one of these projects/services – 1-2 slides; 5 minutes.

- NSF-funded DataNet projects:
 1. Data Conservancy <http://dataconservancy.org/>
 2. DataOne <https://www.dataone.org/>
 3. DataNet Federation Consortium (DFC) UNC-Chapel Hill <http://datafed.org/> (Talk with Drs. Rajasekar and Moore)
 4. TerraPopulus (A global population/environment data network) – University of Minnesota <http://www.terrapop.org/>
 5. SEAD (Sustainable Environment – Actionable Data) – University of Michigan <http://sead-data.net/>
- Services/Organizations:
 1. Bitcurator Consortium. <http://www.bitcuratorconsortium.org/>
 2. Public Library of America. (DPLA) <http://dp.la/>
 3. Europeana <http://www.europeana.eu/portal/>
 4. Lyris <https://www.lyris.org/Pages/Main.aspx>
 5. Northeast Document Conservation Center (NEDCC) <https://www.nedcc.org/>
 6. OCLC Research (regarding archiving and digital preservation)
<http://www.oclc.org/research.html>
 7. Open Planets Foundation (OPF) <http://openpreservation.org/>

6. Tuesday, September 26. No Class. I will be at the IPRES '17 conference.**THEME: REPOSITORY CONTEXT
SESSION 7 – 8A****7A. Tuesday, October 3: OAIS.**

- The Standard.
 - # CCSDS 650.0-M-2: Reference Model for an Open Archival Information System (OAIS).
Magenta Book. June 2012. [This Recommendation has been adopted as ISO 14721:2012.]
<http://public.ccsds.org/publications/archive/650x0m2.pdf>. BROWSE

- Using and Understanding the Standard.
 - ✚ Cornell University. “Digital Preservation Management Tutorial: Implementing Short-term Strategies for Long-term Problems.” Section 4b: OAIS Reference Model, under Section 4: Foundations: http://www.icpsr.umich.edu/dpm/dpm-_/foundation/oais/index.html.
 - ✚ Lavoie, B. “The Open Archival Information System Reference Model: Introductory Guide.” DPC Technology Watch Report Series 04-01. 2004. http://www.dpconline.org/docs/lavoie_OAIS.pdf.
 - ✚ Tufts and Yale: *Fedora and the Preservation of University Records*. Section 1.5: “Requirements for Trustworthy Recordkeeping Systems and the Preservation of Electronic Records in a University Setting.” 2006. <http://dca.lib.tufts.edu/features/nhprc/>
-

7B. Tuesday, October 3: Institutional Readiness for Repositories.

Objectives:

- Be able to discuss the Three-Legged Stool Model and why it is important to digital curation activities.
 - Be able to apply the Five Stages of Institutional Readiness as a digital curation maturity model.
 - Be able to discuss why organizations should manage their digital curation activities through a hierarchy of nested strategies, policies, and implementation plans.
- ✚ Assessing Institutional Digital Assets (AIDA). <http://aida.jiscinvolve.org/wp/>
 - ✚ Bishoff, Liz. “Digital Preservation Readiness Webliography.” Northeast Document Conservation Center, April 2008. (Browse) <http://www.nedcc.org/resources/leaflets/6Reformatting/08DigitalPreservationReadiness.php>.
 - ✚ Cornell University Library. “Digital Preservation Management: Implementing Short-Term Strategies for Long-Term Problems.” <http://www.dpworkshop.org/dpm-eng/challenges/index.html>. Please complete 5: Challenges; 6: Program Elements; and Conclusion.
 - ✚ Dooley, Jackie M. “Taking Our Pulse: The OCLC Research Survey of Special Collections and Archives.” Dublin, OH: OCLC Research, 2010. <http://www.oclc.org/content/dam/research/publications/library/2010/2010-11.pdf>.
 - ✚ Heritage Preservation. A Public at Risk: The Heritage Health Index Report on the State of America’s Collections; a project of Heritage Preservation and the Institute of Museum and Library Services, 2005. <http://www.heritagepreservation.org/HHI/HHIsummary.pdf>.
 - ✚ Kenney, Anne R & Nancy Y. McGovern. “The Five Organizational Stages of Digital Preservation.” In Patricia Hodges; Maria Bonn; Mark Sandler; John Price Wilkin, eds. *Digital Libraries: A Vision for the 21st Century: A Festschrift in Honor of Wendy Lougee, on the Occasion of her Departure from the University of Michigan*. Ann Arbor, MI: University of Michigan, 2003. <http://quod.lib.umich.edu/cgi/t/text/text-idx?c=spobooks;idno=bbv9812.0001.001;rgn=div1;view=text;cc=spobooks;node=bbv9812.0001.001%3A11>
 - ✚ Kenney, A.R. and Buckley, E. “Developing Digital Preservation Programs: the Cornell Survey of Institutional Readiness, 2003-2005.” *RLG DigiNews*, 9, no. 4 (Aug. 15, 2005). <http://worldcat.org/arcviewer/1/OCC/2007/08/08/0000070511/viewer/file3612.html#article0>

- ✚ NEDCC. “Surveying Digital Preservation Readiness: Toolkit for Cultural Organizations.” <http://www.nedcc.org/resources/digtools.php>
- ✚ Russell, A. “Surveying the Digital Readiness of Institutions.” *First Monday*, 12, no. 7 (2007). <http://www.firstmonday.org/htbin/cgiwrap/bin/ojs/index.php/fm/article/view/1921/1803>

DUE : Briefing Paper #1 : Digital Image Capture. Submit digital and print versions.

8. Tuesday, October 10: Project Planning, Policies, Tools, and Workflows.

Objective:

- Students will be able to identify and describe critical steps in digital preservation project planning, as well as be able to discuss best practices in designing project workflows.
- ✚ Beagrie, Neil; Najla Semple; Peter Williams; and Richard Wright. “Digital Preservation Policies Study. Part 1: Final Report October 2008.” http://www.jisc.ac.uk/media/documents/programmes/preservation/jiscpolicy_p1finalreport.pdf.
 - ✚ Bishoff, Liz. “Planning for Digital Preservation: A Self-Assessment Tool.” NEDCC. 2007. <http://nedcc.org/resources/digital/downloads/DigitalPreservationSelfAssessmentfinal.pdf>
 - ✚ Davis, Susan E. “Electronic Records Planning in ‘Collecting’ Repositories.” *The American Archivist*. Vol 71, No. 1 (Spring-Summer 2008).
 - ✚ DigitalPreservationEurope. PLATTER. http://www.digitalpreservationeurope.eu/publications/reports/Repository_Planning_Checklist_and_Guidance.pdf.
 - ✚ IMLS Forum. “A Framework of Guidance for Building Good Digital Collections.” 2nd Ed. December 2004. <http://www.niso.org/framework/Framework2.html>.
 - ✚ JISC Digital Media. “Project Management for a Digitisation Project.” <http://www.jiscdigitalmedia.ac.uk/crossmedia/advice/project-management-for-a-digitisation-project/>
 - ✚ National Library of Australia. Digital Preservation Policy, 3rd ed. (2008). <http://www.nla.gov.au/policy/digpres.html>.
 - ✚ NDLP Project Planning Checklist; <http://lcweb2.loc.gov/ammem/prjplan.html>
 - ✚ *NINCH Guide to Good Practice*. Chapter 2. “Project Planning.” <http://www.nyu.edu/its/humanities/ninchguide/II/>.
 - ✚ Noonan, Daniel. “Digital Preservation Policy Framework: A Case Study.” *Educause Review* <http://er.educause.edu/articles/2014/7/digital-preservation-policy-framework-a-case-study>
 - ✚ OSU’s Digital Preservation Policy Framework can be found at: <https://library.osu.edu/document-registry/docs/260>
 - ✚ Reiger, Oya Y. Chapter 8: “Project to Programs: Developing a Digital Preservation Policy,” In: Kenney, Anne R. & Oya Reiger. *Moving Theory into Practice*. Mountain View, CA: RLG, 2000, 135-152. On reserve in SILS Library.
 - ✚ Shelden, Madeline. “Analysis of Current Digital Preservation Policies: Archives, Libraries, and Museums.” For NDIIPP. 2013. <http://www.digitalpreservation.gov/documents/Analysis%20of%20Current%20Digital%20Preservation%20Policies.pdf?loclr=blogsig>. See also:

<http://blogs.loc.gov/thesignal/2013/08/analysis-of-current-digital-preservation-policies-archives-libraries-and-museums/>

Digital Curation Tools

- # Digital Preservation Coalition. “A Beginner’s Guide to Digital Preservation Tools.” <http://www.dpconline.org/handbook/technical-solutions-and-tools/tools>
- # Community Owned digital Preservation Tool Registry (COPTR). “COPTR describes tools useful for [long term digital preservation](#) and acts primarily as a finding and evaluation tool to help practitioners find the tools they need to preserve digital data. COPTR is collating the knowledge of the digital preservation community on preservation tools in one place. Instead of organisations [competing against each other with their own registries](#), COPTR is bringing them together. In doing so it's objective is to provide the best resource for practitioners on digital preservation tools.” http://coptr.digipres.org/Main_Page Please browse.

Digital Curation Workflows

- # Boock, Michael and Brian E. Davis. “Next Steps for Building a Flexible and Robust Digital Preservation Infrastructure at Oregon State University Libraries & Press.” 3/3/2017. URI: <http://hdl.handle.net/1957/60365>
- # Fisher, Katherine. “Barriers to Digital Preservation in Special Collections Departments.” 45/4 *Preservation, Digital Technology & Culture*. (Feb. 2017): 180-185.
- # Archivematica. <https://www.archivematica.org/en/>. Please browse site.
- # DuraCloud. <http://Duracloud.org>
- # ExLibris. Rosetta. <http://www.exlibrisgroup.com/category/RosettaOverview> Please browse site.
- # Preservica. <http://preservica.com/> Please browse site.
- # Please visit the SCAPE Project website now curated by the Open Preservation Foundation for examples of preservation workflows: <http://wiki.opf-labs.org/display/SP/>
- #

Meeting with instructor regarding term projects. Preliminary project report due at time of meeting.

**THEME: CREATING DURABLE DIGITAL OBJECTS THROUGH STANDARDS AND
DIGITIZATION BEST PRACTICE
SESSIONS 9 - 10**

9A. Tuesday, October 17: Best Practices for Creating Digital Objects.

Visit the North Carolina Digital Heritage Center. <http://www.digitalnc.org/about/> for first half of class (2:15-3:00). Second half of class we will discuss your experience at the NCDHC and the readings.

Objectives:

- Students will be able to identify best practices and standards for creating durable digital objects.
 - Students will be able to discuss motivations for digitization projects, as well as challenges.
- ✚ American Library Association. The Association for Library Collections and Technical Services Preservation and Reformatting Section. "Minimum Digitization Capture Recommendations." Draft Version for Comment. June 2012.
http://connect.ala.org/files/43293/MCTF_Draft_Recommendation.pdf.
 - ✚ Cornell University. *Moving Theory into Practice Digital Imaging Tutorial*, Chapter 6: Technical Infrastructure (parts a, b, c and d).
<http://www.library.cornell.edu/preservation/tutorial/contents.html>
 - ✚ Conway, Paul. "Preservation in the Age of Google: Digitization, Digital Preservation, and Dilemmas." *Library Quarterly* 80, no. 1 (2010): 61-79.
 - ✚ Conway, Paul. "Tec(h)tonics: Reimagining Preservation." *College & Research Libraries News* 69, no. 10 (2008): 598-601.
<http://crln.acrl.org/content/69/10/598.full.pdf+html>
 - ✚ Federal Agencies Digitization Guidelines Initiative (FADGI).
<http://www.digitizationguidelines.gov/>
 - ✚ NCECHO. *Guidelines for Digitization* 2007. Revised Edition.
<http://www.ncecho.org/dig/digguidelines.shtml>
 - ✚ NINCH *Guide to Good Practice*. Chapter 1. "Introduction."
<http://www.nyu.edu/its/humanities/ninchguide/I/>
 - ✚ Northeast Document Conservation Center.
<http://www.nedcc.org/education/training/calendar.php>
 - ✚ JISC *Digital Media Website*. <http://www.jiscdigitalmedia.ac.uk/>

9B. Tuesday, October 17: Standards.

Objective:

- Students will be able to identify key standards for creating durable digital objects.
- ✚ CCSDS. *Audit and Certification of Trustworthy Digital Repositories*. Magenta Book. Recommended Practice. September 2011.
<http://public.ccsds.org/publications/archive/652x0m1.pdf>
 - ✚ Higgins, Sarah. "DCC DIFFUSE Standards Frameworks: A Standards Path through the Curation Lifecycle." *The International Journal of Digital Curation* 2/4 (2009).
<http://www.ijdc.net/index.php/ijdc/article/viewFile/118/136>.
 - ✚ Waibel, Günter. "Like Russian Dolls: Nesting Standards for Digital Preservation." *RLG DigiNews* 7/3 (June 2003).
<http://worldcat.org/arcviewer/1/OCC/2007/08/08/0000070511/viewer/file674.html#feature2>

10A. Tuesday, October 24: Metadata for Access, Management, and Preservation.

Objective:

- Students will gain awareness of a variety of metadata standards essential to digital preservation and understand how information professionals are using them.
- Review of various standards (MARC, MODS, METS, DCMI, PREMIS)
 - ✚ Caplan, Priscilla. "Understanding PREMIS." Library of Congress PREMIS Website. 2009. <http://www.loc.gov/standards/premis/understanding-premis.pdf>
 - ✚ Dappert, Angela and Markus Enders. "Using METS, PREMIS and MODS for Archiving eJournals," *D-Lib Magazine* September/October 2008. <http://www.dlib.org/dlib/september08/dappert/09dappert.html>
 - ✚ Gilliland-Swetland, Anne. "Introduction to Metadata: Setting the Stage," Getty Research Institute, Online Edition. Version 2.1. http://www.getty.edu/research/publications/electronic_publications/intrometadata/
 - ✚ Library of Congress. PREMIS Website. (PREservation Metadata Implementation Strategies). <http://www.loc.gov/standards/premis/>
 - ✚ *Moving Theory into Practice Digital Imaging Tutorial*, Chapter 5. <http://www.library.cornell.edu/preservation/tutorial/metadata/metadata-01.html> .
 - ✚ OCLC Website for Dublin Core materials: <http://purl.org/DC/>
 - ✚ *Understanding Metadata*. NISO Press, 2004. <http://www.niso.org/standards/resources/UnderstandingMetadata.pdf>.

10B. Tuesday, October 24: Metadata Exercise.

11A. Tuesday, October 31: File Formats.

Objective:

- Students will be able to identify key file format and storage media considerations for creating durable digital objects.
- ✚ dpBestFlow. (<http://www.dpbestflow.org/file-format/file-format-overview>).
- ✚ Brown, Adrian. "Selecting File Formats for Long-Term Preservation." Digital Preservation Guidance Note 1. London: The National Archives, August 2008. <http://www.nationalarchives.gov.uk/documents/selecting-file-formats.pdf>.
- ✚ CENDI Digital Preservation Task Group. *Formats for Digital Preservation: A Review of Alternatives and Issues*. http://www.cendi.gov/publications/CENDI_PresFormats_WhitePaper_03092007.pdf
- ✚ FADGI. <http://www.digitizationguidelines.gov/> Browse site, guidelines, and articles.
- ✚ InterPARES. Selecting File Formats for Long-Term Preservation. [http://www.interpares.org/display_file.cfm?doc=ip2_file_formats\(complete\).pdf](http://www.interpares.org/display_file.cfm?doc=ip2_file_formats(complete).pdf)

- # **Library of Congress. Sustainability of Digital Formats.**
<https://www.loc.gov/preservation/digital/formats/> Browse this site.
- # Library of Congress. National Digital Stewardship Alliance.
<http://www.digitalpreservation.gov/ndsa/>
- # **McGath, Gary. "The Format Registry Problem."** *code4Lib Journal* (2013).
<http://journal.code4lib.org/articles/8029>
- # National Archives of Australia. "Digital Preservation: Guiding the Past, Illuminating the Future." (June 2006). http://www.naa.gov.au/images/xena_brochure%5B1%5D_tcm2-918.pdf
- # Office for Information Systems - Harvard University Library. "File Formats & Guidelines."
<http://hul.harvard.edu/ois/digpres/guidance.html>.
- # "Recommended Data Formats for Preservation Purposes in the FCLA Digital Archive."
<http://www.fcla.edu/digitalArchive/pdfs/recFormats.pdf>.
- # Rog, Judith and Caroline van Wijk. "Evaluating File Formats for Long-term Preservation."
White Paper: National Library of the Netherlands, 2007.
http://www.kb.nl/hrd/dd/dd_links_en_publicaties/publicaties/KB_file_format_evaluation_method_27022008.pdf
- # Rosenthal, D. (2010). Format Obsolescence: Assessing the Threat and the Defenses. *Library Hi-Tech*, 28(2), 195-210. <http://dx.doi.org.libproxy.lib.unc.edu/10.1108/07378831011047613>
- # **Thompson, D. (2010). A Pragmatic Approach to Preferred File Formats for Acquisition.** *Ariadne*, 63. Accessed August 19, from <http://www.ariadne.ac.uk/issue63/thompson/>
- # Todd, Malcolm. (2009). *Technology Watch Report: File Formats for Preservation*. DPC Technology Watch Series Report 09-02. London: Digital Preservation Coalition.
http://www.dpconline.org/component/docman/doc_download/375-file-formats-for-preservation
- # Responses to the Technology Watch Report: <http://dablog.ulcc.ac.uk/2009/12/03/ffods/>
Read the comments, too!

11B. Tuesday, October 31: Storage.

- # **Baker, Mary, Kimberly Keeton, and Sean Martin. "Why Traditional Storage Systems Don't Help Us Save Stuff Forever."** HP Laboratories Palo Alto, 2005.
<http://www.hpl.hp.com/techreports/2005/HPL-2005-120.pdf>.
- # Brown, Adrian. "Selecting Storage Media for Long-Term Preservation." London: The National Archives (August, 2008). <http://www.nationalarchives.gov.uk/documents/information-management/selecting-storage-media.pdf>.
- # **Digital Preservation Coalition (DPC). "Storage" in *DPC Handbook***
<http://www.dpconline.org/handbook/organisational-activities/storage>
- # Farmer, Jacob. "Storage Design for High Capacity and Long Term Storage: Balancing Cost, Complexity and Fault Tolerance." PowerPoint Slides.
<http://www.diglib.org/forums/spring2009/presentations/Farmer.pdf>
- # Library of Congress. Designing Storage Architectures for Digital Preservation.
http://www.digitalpreservation.gov/news/events/other_meetings/storage10/
- # **The Science and Technology Council of the Academy of Motion Picture Arts and Sciences. *The Digital Dilemma: Strategic Issues in Archiving and Accessing Digital Motion Picture Materials*. (November 2007).**
<http://www.dmclab.jp/~kaneko/dmcsympo20081024/pdf/Maltz-20081024.pdf> Please read chapters 5 & 6 and browse remainder.

- ✚ Wright, Richard, Ant Miller, and Matthew Addis. "The Significance of Storage in the "Cost of Risk" of Digital Preservation." *The International Journal of Digital Curation* 3/4 (2009). <http://www.ijdc.net/index.php/ijdc/article/viewFile/138/173>

11C. Tuesday, October 31: Preservation Scenario Presentations.

AUTHENTICITY & APPRAISAL SESSION 11

12A. Tuesday, November 7. Authenticity.

- ✚ Adam, Sharon. "Preserving Authenticity in the Digital Age." *Library Hi Tech* 28, no. 4 (2010): 595-604.
- ✚ Bearman, David and Jennifer Trant. "Authenticity of Digital Resources: Towards a Statement of Requirements in the Research Process." *D-Lib Magazine* (June 1998).
- ✚ Bradley, Rachael. "Digital Authenticity and Integrity: Digital Cultural Heritage Documents as Research Resources." *portal: Libraries and the Academy* 5, no. 2 (2005): 165-175.
- ✚ Cain, Mark. "Being a Library of Record in a Digital Age." *The Journal of Academic Librarianship* 29, no. 6 (2003): 405-410.
<http://www.dlib.org/dlib/june98/06bearman.html>.
- ✚ CLIR. *Authenticity in a Digital Environment*. Washington, DC.: Council on Library and Information Resources, 2000. <http://www.clir.org/pubs/reports/pub92/pub92.pdf>. Scan all; read Lynch.
- ✚ *Integrity and Authenticity of Digital Cultural Heritage Objects*. Digicult Thematic Issue #1, 2002. http://www.digicult.info/downloads/thematic_issue_1_final.pdf Read Ross essay, pp. 7-8, and scan remainder.

12B. Tuesday, November 7: Selection and Appraisal

➤ *Why Digitize?*

- ✚ Coyle, Karen. Mass Digitization of Books. *The Journal of Academic Librarianship* 32(6) (2006): 641-645. Available in UNC e-journals.
- ✚ Harvey, Ross. "Appraisal and Selection." *DCC Digital Curation Manual*. (2007). http://www.dcc.ac.uk/webfm_send/121.
- ✚ ICPSR. "Selection and Appraisal." <http://www.icpsr.umich.edu/icpsrweb/ICPSR/curation/selection.jsp>.
- ✚ Hazen, Dan, Jeffrey Horrell, and Jan Merrill-Oldham. "A Decision-Making Matrix" from *Selecting Research Collections for Digitization*. Washington, DC: CLIR, 1998. <http://www.clir.org/pubs/reports/hazen/matrix.html>.
- ✚ Johnson, Richard K. "In Google's Broad Wake: Taking Responsibility for Shaping the Global Digital Library." *ARL: A Bimonthly Report* 250 (2007): 1-15. <http://www.arl.org/bm~doc/arlbr250digprinciples.pdf>.

➤ **Overview of Selection Principles.**

- ✚ Gertz, Janet. "Preservation and Selection for Digitization." NEDCC. 2007. <http://www.nedcc.org/resources/leaflets/6Reformatting/06PreservationAndSelection.php>.
- ✚ Work through the "Moving Theory into Practice Digital Imaging Tutorial," Chapter 2. <http://www.library.cornell.edu/preservation/tutorial/selection/selection-01.html>
- ✚ NCECHO. *Guidelines for Digitization*. 2005. <http://www.ncecho.org/guide/selection.asp>
- ✚ National Information Standards Organization, Framework Advisory Group. 2004. *A Framework of Guidance for Building Good Digital Collections*. 2nd edition. <http://www.niso.org/framework/framework2.html>
- ✚ Rieger, Oya Y. *Preservation in the Age of Large-Scale Digitization A White Paper*. CLIR Report 141 (February 2008). <http://www.clir.org/pubs/abstract/pub141abst.html>,

**THEME: COSTING AND BUDGETING
SESSION 13**

13A. Tuesday, November 14: How Much Does This All Cost?

- ✚ Curation Costs Exchange. <http://www.curationexchange.org/>
- ✚ Rosenthal, David S. H. et al. "The Economics of Long -Term Digital Storage." In L. Duranti & E. Shaffer (Eds.), *The Memory of the World in the Digital age: Digitization and Preservation: An international conference on permanent access to digital documentary heritage, Vancouver, Canada, 26-28 September 2012* (pp. 513-528). Vancouver, Canada: UNESCO. Retrieved from http://www.unesco.org/webworld/download/mow/mow_vancouver_proceedings_en.pdf

13B. Tuesday, November 14: Making the Case for Value.

- ✚ DPC. Business Case Studies http://wiki.dpconline.org/index.php?title=Case_studies
- ✚ DPC. Digital Preservation Business Case Toolkit. http://wiki.dpconline.org/index.php?title=Digital_Preservation_Business_Case_Toolkit
- ✚ DPC. *Digital Preservation Handbook*. "Business Cases, Benefits, Costs, and Impact." <http://www.dpconline.org/handbook/institutional-strategies/business-cases-benefits-costs-and-impact>

13C. Tuesday, November 14: Project Budgeting.

DUE : Briefing Paper #2: Professional Interview. Submit digital and print versions.

**THEME: AUDITING AND PROTECTION
SESSION 14**

14A. Tuesday, November 21: Presentation of Grant Proposals.

14B. Tuesday, November 21: Project & Risk Management.

- # Barateiro, José. “Designing Digital Preservation Solutions: A Risk Management-Based Approach.” *The International Journal of Digital Curation* 1/5 (2010).
<http://www.ijdc.net/index.php/ijdc/article/viewFile/143/205>
- # DCC and DPE. *DRAMBORA Interactive*. <http://www.repositoryaudit.eu/>.
- # *Moving Theory into Practice Digital Imaging Tutorial*, Chapter 9. “Management.”
<http://www.library>
- # Center for Research Libraries. *Trustworthy Repositories Audit & Certification: Criteria and Checklist*. Version 1.0. February 2007.
<http://catalog.crl.edu/search~S1?/Xtrusted+repositories&searchscope=1&SORT=R/Xtrusted+repositories&searchscope=1&SORT=R&SUBKEY=trusted%20repositories/1,15,15,B/1856~b2212602&FF=Xtrusted+repositories&searchscope=1&SORT=R&6,6,,1,0>.

14C. Tuesday, November 21: Trustworthy Repositories and Evaluation.

- # CCSDS. *Audit and Certification of Trustworthy Digital Repositories*. 2011. Magenta Book, <http://public.ccsds.org/publications/archive/652x0m1.pdf>
- # Ferriero, David. “ISO Standards for Certifying Trustworthy Digital Repositories.” *NARAtions: Blog of the Archivist of the United States*. (March 15, 2011)
<http://blogs.archives.gov/online-public-access/?p=4697>
- # Ross, Seamus and Andrew McHugh. “The Role of Evidence in Establishing Trust in Repositories.” *D-Lib Magazine* 12 7/8 (July/August 2006).
<http://www.dlib.org/dlib/july06/ross/07ross.html>.

THEME: ACCESS & OUTREACH
SESSION 15

15. Tuesday, November 28: Providing Access.

- Access, Discovery, Users
 - # Chowdhury, Gobinda. "From Digital Libraries to Digital Preservation Research: The Importance of Users and Context." *Journal of Documentation* 66, no. 2 (2010): 207-223.
 - # Hedstrom, Margaret L., Christopher A. Lee, Judith S. Olson, and Clifford Lampe. “The Old Version Flickers More:” Digital Preservation from the User’s Perspective. *The American Archivist* 69 (Spring/Summer 2006): 159-187.
 - # Yakel, Beth et al. “The Archival Metrics Toolkit.”
http://deepblue.lib.umich.edu/bitstream/2027.42/63088/1/1450450379_ftp.pdf; and
<http://www.archivalmetrics.org/>
- Social Networking and Crowdsourcing
 - # Social Networking in Libraries. ALA. 2011.
<http://www.ala.org/news/mediapresscenter/americaslibraries/socialnetworking>
 - # Owens, Trevor. “The Crowd and the Library.” 2012.
<http://www.slideshare.net/tjowens/the-crowd-and-the-library>
- Web Analytics

- # Google Analytics, <http://support.google.com/analytics/?hl=en>; and AWStats, <http://awstats.sourceforge.net/>
- # Prom, Chris. "Using Web Analytics to Improve Online Access to Archival Resources." *American Archivist* 74/1 (2011): 158-184.

15B. Tuesday, November 28: Copyright and Rights Management.

- # Coyle, Karen. "Rights in the PREMIS Data Model: A Report for the Library of Congress." Washington, D.C.: Library of Congress, December 2006.
<http://www.loc.gov/standards/premis/Rights-in-the-PREMIS-Data-Model.pdf>.
- # Gasaway, Laura N. "America's Cultural Record: A Thing of the Past?" *Houston Law Review*, 2003. <http://www.unc.edu/%7Euncng/America%27s%20cultural%20record.htm>
- # Hirtle, Peter. "Copyright Term and the Public Domain in the United States" (table). (January 2007). <http://www.copyright.cornell.edu/training/copyrightterm.pdf>
- # Hirtle, Peter B. "Digital Preservation and Copyright." Stanford University Libraries. Copyright and Fair Use.
http://fairuse.stanford.edu/commentary_and_analysis/2003_11_hirtle.html
- # Leary, Heather, Kacy Lundstrom, and Pamela Martin. Copyright Solutions for Institutional Repositories: A Collaboration with Subject Librarians." *Journal of Library Innovation* Vol. 3 Issue 1 (2012): 101-110.
- # Library of Congress et al. "International Study on the Impact of Copyright Law on Digital Preservation." A joint report of The Library of Congress National Digital Information Infrastructure and Preservation Program, the Joint Information Systems Committee, the Open Access to Knowledge (OAK) Law Project, and the SURFfoundation. (July and September 2008).
http://www.digitalpreservation.gov/library/resources/pubs/docs/digital_preservation_final_report2008.pdf Read Parts 1, 5, and 6.
- # Section 1098 Study Group. *Executive Summary*. March 2008.
<http://www.section108.gov/docs/Sec108ExecSum.pdf>

15C. Tuesday, November 28: Approaches to Preservation: Migration, Emulation & Beyond.

- # British Library. "British Library Digital Preservation Strategy." (2006).
<http://www.bl.uk/aboutus/stratpolprog/ccare/introduction/digital/digpresstrat.pdf>
- # Cornell University. Digital Preservation Management Tutorial: Implementing Short-term Strategies for Long-term Problems. "Digital Preservation Strategies."
<http://www.library.cornell.edu/iris/tutorial/dpm/terminology/strategies.html>.
- # DataONE. "DataONE Preservation Strategy."
<http://mule1.dataone.org/ArchitectureDocs-current/design/PreservationStrategy.html>.
- # Hedstrom, Margaret L., Christopher A. Lee, Judith S. Olson, and Clifford Lampe. "The Old Version Flickers More:" Digital Preservation from the User's Perspective. *The American Archivist* 69 (Spring/Summer 2006): 159-187.
<http://www.metapress.com/content/1765364485n41800/fulltext.pdf>.

- ✦ JISC. “Preservation Strategy.” *JISC Beginners Guide to Digital Preservation*. <http://blogs.ukoln.ac.uk/jisc-beg-dig-pres/content/how-do-i-preserve-digital-objects/preservation-strategy/>
- ✦ National Archives of Australia. An Approach to the Preservation of Digital Records. 2002. http://www.naa.gov.au/recordkeeping/er/digital_preservation/Green_Paper.pdf.
- ✦ Rothenberg, Jeff. “Ensuring the Longevity of Digital Documents.” *Scientific American* 272 (January 1995): 42–47.
- ✦ Strodl, Stephan, Andreas Rauber, Christoph Rauch, and Robert Neumayer, “How to Choose a Digital Preservation Strategy: Evaluating a Preservation Planning Procedure.” *Proceedings of the ACM IEEE Joint Conference on Digital Libraries*. June 18-23, 2007: Vancouver, British Columbia, Canada, pp. 29-38. Available through UNC e-journals. http://delivery.acm.org/10.1145/1260000/1255181/p29-strodl.pdf?ip=152.23.117.11&acc=ACTIVE%20SERVICE&CFID=134749602&CFTOKEN=71874560&_acm_=1351621553_21dec6d3c2fbd1e089b6b3745617c60.
- ✦ Thibodeau, Kenneth. “Overview of Technological Approaches to Digital Preservation and Challenges in Coming Years.” In *The State of Digital Preservation: An International Perspective. Conference Proceedings*. Washington, D.C., Documentation Abstracts, Inc. Institutes for Information Science, April 24-25, 2002. Council on Library and Information Resources, Washington, D.C. <http://www.clir.org/pubs/reports/pub107/thibodeau.html>.
- ✦ von Suchodoletz, Dirk and Jeffrey van der Hoeven. “Emulation: From Digital Artefact to Remotely Rendered Environments.” *The International Journal of Digital Curation* 3/4 (2009) <http://www.ijdc.net/index.php/ijdc/article/viewFile/141/177>.

Turn in Grant Proposals! (give 1 print copy to instructor and send proposal to class list as an attachment). Please email as soon as finished so folks have some time to evaluate.

SUNDAY, December 3:

- ✦ Institute of Museum and Library Services (IMLS). Reviewer 101 LB 21 Narrated Web Presentation http://www.ims.gov/pdf/Reviewer_101_LB21_Narrated_Web_Presentation.pdf
- ✦ Institute of Museum and Library Services (IMLS). Reviewer 101 Web Presentation handout http://www.ims.gov/pdf/Printout_of_Reviewer_101_web_presentation.pdf
- ✦ Institute of Museum and Library Services (IMLS). “2011 National Leadership Grants Panelist Handbook.” http://www.ims.gov/pdf/2011_NLG_Panelist_Handbook.pdf

DUE: Peer reviews of grant proposals due. Use Qualtrics online survey for data entry.

16A. Tuesday, December 5: Funding Results for Your Projects.

16A. Tuesday, December 5: Projects to Programs: Policies, Sustainability, and New Directions.

- # The Blue Ribbon Task Force on Sustainable Digital Preservation and Access. “Sustainable Economics for a Digital Planet: Ensuring Long-Term Access to Digital Information.” 2010. http://brtf.sdsc.edu/biblio/BRTF_Final_Report.pdf Read Exec. Summary. See also the BRTF website: <http://brtf.sdsc.edu/about.html>
- # Bradley, Kevin. “Defining Digital Sustainability.” *Library Trends* 56/1 (Summer 2007): 148-163. <https://muse.jhu.edu/article/223247/pdf>
- # Eakin, Lori, Amy Friedlander, Roger Schonfeld, & Sayeed Choudhury. “A Selective Literature Review on Digital Preservation Sustainability.” December 2008. http://brtf.sdsc.edu/biblio/Cost_Literature_Review.pdf
- # LaVoie, Brian and Lorcan Dempsey (2004) “Thirteen Ways of Looking at...Digital Preservation.” *D-LibMagazine* 10(7/8). <http://www.dlib.org/dlib/july04/lavoie/07lavoie.html>.
- # Levitt. *Towards a Robust Strategy for Digital Archiving and Preservation*. Santa Monica, Calif.: Rand Europe, 2007. http://www.rand.org/pubs/technical_reports/TR510.html
- # Library of Congress. “Sustainability of Digital Formats Planning for Library of Congress Collections.” <http://www.digitalpreservation.gov/formats/sustain/sustain.shtml>.
- # National Library of Australia. Digital Preservation Policy, October 2007. <http://www.nla.gov.au/policy/digpres.html>.
- # Walters Tyler O. and Katherine Skinner. "Economics, Sustainability, and the Cooperative Model in Digital Preservation." 28/2 *Library Hi Tech* (2010): 259-272. <https://doi.org/10.1108/07378831011047668>

16B. Tuesday, December 5: Culminating DTIR Exercise.

16C. Tuesday, December 5: Course Recap and Lessons Learned Summary.

16D. Tuesday, December 5: Class Evaluations.