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Newspaper Digitization: Working With Vendors

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Outsourcing Pros

- Less investment - don't pay for scanning equipment and staffing; just production
- High production levels
- Established workflows
- On-site expertise
- Less risk to the organization
- Vendor absorbs that cost of technology obsolescence, failures, downtime, etc.

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Guidelines for Working with Vendors

- Prior to starting the project, the vendor should know:
  - General nature of the project
  - General description of the materials
  - How the digitized objects will be used
  - Where the work is to be performed – on/off site?
  - Anticipated schedule

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Which is a newspaper?

How do you count them?

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Vendor Relations

- The vendor will also 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

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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

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What the Vendor Wants

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

  - What is quality control?
  - What is high quality?
  - What is preservation standards?
  - What is metadata?

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Specifications?

What is important to you?
  - Handling?
  - Timelines?
  - Scanning specifications?
  - File formats?
  - DPI?
  - Scanning philosophy?

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Developing a Successful Request

1. Develop concept
   - Especially consider goals and standards

2. Identify potential vendors

3. Send out rfi
   - explain goals, timelines, outcomes
   - description of methodology (if any)
   - ask for comment on methodology and alternatives
   - responses give sample approaches and show interest

4. Establish project methodology and standards

More: Handbook for Digital Projects; Management Tool for Preservation and Access, NEDCC

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Developing a Successful Request

5. Develop short list of vendors

6. Write rfp and send to short list with samples
   clear, explicit and detailed
7. Communicate with vendors on questions

8. Evaluate and compare proposals

9. Write and sign contract
   be specific about timelines, reports, quality standards, errors, etc.
   - More: Handbook for Digital Projects; Management Tool for Preservation and Access, NEDCC

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Communicating with Vendors

- Establish communication during RFI/RFQ process
  - Better these documents, clearer path
- Pilot
  - Test procedures and workflows with small batch
- Quality control and corrections
  - Establish procedures for issues early on!
  - 100 % QC at first
  - What is "wrong", how do you communicate, how is it corrected?

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Who: Selecting a Vendor

- Vendor list
- Consider:
  - Experience with cultural heritage institutions
  - Experience with your kind of project
    - "we can do it" vs. "we have done it"
- References/samples
- Develop criteria
  - Price
  - Timeline
  - Experience

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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

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Consider: Costs

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

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Consider: Needs

- Everyone wants it:
  - Fast
  - High quality
  - Inexpensive
  - You can have two of those

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Resources

- Cornell Library, *From Theory to Practice Tutorial:* Section 9: Management
- http://www.library.cornell.edu/preservation/tutorial/management/management-03.html

- Library of Congress, American Memory Technical Information
- http://memory.loc.gov/ammem/about/techIn.html

- LYRASIS Digital Toolbox
- https://www.lyrasis.org/LYRASIS%20Digital/Pages/Preservation%20Services/Resources%20and%20Publications/Digital-Toolbox.aspx

- National Information Standards Organization (NISO), A Framework of Guidance for Building Good Digital Collections
- http://www.niso.org/home/

- NEDCC Handbook for Digital Projects: A Management Tool for Preservation & Access: Chapter 8 Vendor Relations
- http://www.nedcc.org/free-resources/nedcc-publications

- RLG Worksheet for Estimating Digital Reformatting Costs
- http://www.oclc.org/research/activities/digimgtools.html

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RLG Reformatting Worksheet

- A. Select materials
- B. Determine the size of the collection
- C. Prepare documents
- D. Determine imaging requirements (benchmarking)
- E. Determine requirements for and create metadata
- F. Determine imaging costs
- G. Determine text conversion costs
- H. Determine SGML encoding costs
- I. Determine Finding Aid Conversion Costs
- J. Post-process digital files
- K. Estimate additional local costs

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RFPs

- Requests Proposals for Digital Images from Original Documents Text Conversation and SGML-Encoding National Digital Library Program
- http://memory.loc.gov/ammem/prpsal/coverpag.html
- Requests Proposals for Conversation of Microfilm to Digital images for the National Digital Library Program
- http://memory.loc.gov/ammem/prpsal5/coverpag.html
- RLG-OCLC RLG Guidelines for Creating a Request for Proposals. 1997*
- http://www.oclc.org/programs/ourwork/past/digimgtools/RFPGuidelines.pdf
- RLG-OCLC. RLG Model Request for Information, 1997
- http://www.oclc.org/programs/ourwork/past/digimgtools/RLGrfi.pdf
- RLG-OCLC. RLG Model Request for Proposals. 1997.
- http://www.oclc.org/programs/ourwork/past/digimgtools/RLGModelRFP.pdf
- Library of Congress Technical Information
- http://memory.loc.gov/ammem/techdocs/conversion.html

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Final Thoughts

- 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
- Both can be used in one project
- Make the choice as early as possible as the decision will affect virtually planning and budgeting
  - Especially if writing a grant

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Thank you!
Questions?

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Digitization and Outsourcing Best Practices

- Cornell Library, *From Theory to Practice Tutorial:* Section 9: Management
  http://www.library.cornell.edu/preservation/tutorial/management/management-03.html

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- Requests Proposals for Conversation of Microfilm to Digital images for the National Digital Library Program http://memory.loc.gov/ammem/prpsal5/coverpag.html

- RLG-OCLC RLG Guidelines for Creating a Request for Proposals. 1997
  http://www.oclc.org/programs/ourwork/past/digimgtools/RFPGuidelines.pdf

- RLG-OCLC. RLG Model Request for Information, 1997
  http://www.oclc.org/programs/ourwork/past/digimgtools/RLGrfi.pdf

- RLG-OCLC. RLG Model Request for Proposals. 1997.
  http://www.oclc.org/programs/ourwork/past/digimgtools/RLGModelRFP.pdf