Digital Curation

Building an Environment for Success

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Abstract

Successful digital curation requires two distinct but dependent sets of operational tools. The first set of tools focus around the archivist/curator identifying and becoming familiar with technical components necessary to implement a viable digital curation operation including the establishment of a digital repository service. The second set of tools, and arguably the more important of the two, is team building. Digital curation at any institution requires developing an ever-changing web of personal, organizational, cooperative, conceptual, and contractual understandings, agreements, and consensus points as well as concurrent relationships. This presentation discusses, in practical terms, the steps, processes, policies, and procedures that need to be established to provide reliable, long-term access to managed digital resources to its designated community, now and into the future. In addition to reflecting on the standard stages of digital curation, it identifies team-building skill sets that will move a digital curation agenda toward both long- and short-term success.

Author

Esposito has been serving as both faculty and administrator for the Penn State University Archives since 2001. She joined the faculty of the University Libraries in July 1991 as Assistant University Archivist for Records Management/Senior Assistant Librarian. She was tenured and promoted to Associate Librarian in 1998. Esposito co-authored Penn State’s "ElectRar: Electronic Records Repository Specifications Report," presented several conference papers on team management of born-digital records utilizing the Matryoshka (Russian Nesting) dolls theory and served on the development team for the Society of American Archivist’s Digital Archivist Certificate Curriculum Program.

1. Introduction

Successful digital curation requires two distinct but dependent sets of operational tools. The first set of tools is focused on the archivist identifying and becoming familiar with technical components necessary to implement a viable digital curation operation including the establishment of a digital repository service. The second set of tools, and arguably the more important of the two, is team building.

Digital curation at any institution requires developing an ever-changing web of personal, organizational, cooperative, conceptual, and contractual understandings, agreements, and consensus points as well as concurrent relationships. This paper discusses, in practical terms, the steps, processes, policies, and procedures that need to be established to provide reliable, long-term access to managed
digital resources to its designated community, now and into the future. In addition to reflecting on the standard stages of digital curation, this presentation will identify team-building skill sets that will move a digital curation agenda toward both long- and short-term success.

2. Methodology and Scope

This paper reflects on observations from the Society of American Archivist’s Digital Archivist Specialization one-day workshop of the same name, taught by this author, dedicated to identifying both the minimum digital curation skill set in conjunction with necessary team building philosophies to begin a program for institutional born-digital archives, records management, and long-term digital preservation. The workshop, as currently designed, establishes five stages of digital curation: 1) Acknowledge – the local scope of the issue and its long-term responsibilities; 2) Act – initiate “S.M.A.R.T.”1 projects; 3) Consolidate – segue from projects (temporary) to programs (permanent) in staffing and funding; 4) Institutionalize -- incorporating the larger environment and rationalize programs as part of the operational imperative and permanent budgetary structure; and 5) Externalize – embrace inter-institutional collaboration and cooperation.

The workshop also covers and discusses opportunities for success, strategic goals for digital curation, establishing working groups and hot teams, basics of managing electronic content, creating a curation management prototype structure, digital curation management essentials, building effective teams and engaged stakeholders, essentials for digital repositories, and measuring success while re-evaluating goals.

The learning outcomes cover five key areas including:

- An understanding of the components of team building and digital curation necessary to begin working towards a curation prototype in your institution;
- Identification of areas to invest in locally to build knowledge and skills to meets the needs of a digital repository program at your institution;
- Reviewing existing digital repository characteristics that best illustrate roads to success;
- Access to resources, guides, models, and best practices relevant to the digital curation/repository landscape; and
- Identifying and establishing relationships within your organization to achieve a digital archives repository program.

This paper will evaluate the workshop’s goals and learning objectives in light of their applications in a real-world environment by utilizing follow-up survey technology for workshop participants. In addition, the paper will reflect on specific team building relationships that consistently work in institutional environments, specifically working with information technology professionals or coordinating scholarly publications with archival repository management. The guidelines developed for creating an environment for success will be quantitatively evaluated as well as qualitatively summarized utilizing narrative focus group summaries.

1 S-M-A-R-T is a pneumonic which stands for Sensible, Manageable, Achievable, Reasonable and Trackable. The point of SMART planning is creating an environment where projects are do-able within a specific period of time.
3. Background on Digital Archives Specialist (DAS) Certificate Program

The Society of American Archivists undertook the development of a certificate program (www2.archivists.org/prof-education/das) in 2010 by charging a Digital Archives Continuing Education Task Force to develop a detailed curriculum on digital archives. The Task Force was chaired by Geof Huth (New York State Archives) and included Mahnaz Ghaznavi (Loyola Marymount University), David Kay (Little Airplane Productions), Helen Tibbo (University of North Carolina/Chapel Hill and this author. The Task Force reviewed existing course offerings and identified curriculum components for awarding a certificate. The proposed curriculum was distributed to sixteen (16) SAA sections and roundtables for comment in March 2011. The Curriculum was edited and revised before being adopted by the SAA Council at its May 2011 meeting.

The DAS curriculum is structured utilizing four tiers of study:

**Foundational Courses:** essential skills needed to manage digital archives (geared toward practitioners);

**Tactical and Strategic Courses:** skills needed to make significant changes to develop a digital archive or work managing electronic records (geared toward managers);

**Tools and Services Courses:** skills needed to work with specific tools and services utilized in managing digital archives (geared toward immediate use);

**Transformative Courses:** skills needed to change and transform institutions into full-fledged digital archives (geared toward administrators).

A participant has to successfully complete nine (9) required courses from the four tiers and passed the comprehensive exam within a twenty-four (24) month period to receive the DAS certificate. Individual course examinations, multiple-choice questions, are provided online immediately after the course is offered.

The curriculum, which features eight (8) foundational courses, eleven (11) tactical/strategic courses, four (4) tools and services courses, and three (3) transformational courses, is based on seven (7) core competencies including:

- Communicating requirements, roles and responsibilities related to digital archives
- Understanding the nature of records in electronic form
- Formulating strategies and tactics for appraising, describing, managing, organizing, and preserving digital archives
- Integrating technologies and tools
- Planning for the integration of emerging technologies
- Curating, storing, and retrieving original masters and access copies
- Providing dependable organization and service

The DAS certificate comprehensive examination, under development at this writing, will be offered at various locations and will cover the spectrum of the curriculum offerings. The DAS certificate is valid for five (5) years. DAS certificate holders may renew their certificates by successfully completing courses or by testing out. SAA is scheduling courses in collaboration with regional organizations and associations as well as on-demand by individual host institutions. As of August 31, 2012, over eight hundred archivists have taken at least one DAS course and several have completed all the coursework necessary to qualify to take the comprehensive exam.
4. Digital Curation: Creating an Environment for Success

4.1 Course Development and Goals

Following the adoption of the DAS certificate program in May 2011, this author began developing the curriculum and learning outcomes for a one-day workshop which would combine two skills sets: 1) digital curation essentials and 2) team building. The workshop is geared to the archival professional whose institution is beginning to discuss digital content management for business records, publications, archival content, research data, and other uses.

The overall goals of the workshop are to encourage participants to “stop waiting and start” proactive engagement at their local institution. Archivists need to stake a claim in the production cycle, preferably at the beginning of the records life cycle, during its management and use, and through its transfer and preservation. Without a significant infusion of new funds, archival institutions will have to retrain and repurpose existing staff, both internal to their operation and throughout their institution. Archivists should, therefore, focus on being doers within the digital repository process, whenever possible. At all times, archivists should consider digital curation collaborations, internally and externally, as positive developments toward future caretaker responsibilities. By following these recommendations, archivists can actualize collaborative engagements to their benefit for the long-term preservation of the digital object.

4.2 Course Outline

The course is broke down into eleven (11) segments. Each segment is created with its own internal learning outcome and exercises. The segments are:

- **Opportunities for Success**: Advocacy – Who are your partners? How do you approach them? What is the optimum working climate? How do you establish an e-records program?

- **Identifying Strategic Goals for Digital Curation**: What can be accomplished in six months? One year? Three years? Five years? Developing tactical, operational plans to reach set goals.

- **Establishing Working Groups and Hot Teams**: Identify participants and elements of productive teams

- **Over-arching Focus of Digital Curation**: What is the Message? How do you deliver it? Prioritizing digital curation for the institutional IT community for the long-term.

- **Basics of Managing Electronic Content**: Identifying operational, legal and regulatory, and technological challenges.

- **Creating a Curation Management Prototype Structure**: Utilizing the Open Archival Information System (OAIS) Reference Model and the Digital Curation Lifecycle Model to develop a repository structure.
• **Digital Curation Management Essentials**: Guidelines, Standards including all ISO requirements, current operational tools and software products, networking and connectivity, and relationship agreements.

• **Building Effective Teams and Engaged Stakeholders**: Identifying specific stakeholders, roles and responsibilities, and sustaining inter-departmental operations.

• **Essential for Digital Repositories**: Creating a mission statement, policy documents, service agreements, and technical infrastructure.

• **Bringing the Message to the Masses**: Providing education, creating a community of users, recruiting advocates, and producing publications to promote the program.

• **Measuring Success and Re-Evaluating Goals**: Assessment models and surveys.

**4.3 Learning Outcomes**

The workshop operates under five (5) specific learning outcomes. The outcomes are:

1. An understanding of the components of team building and digital curation necessary to begin working towards a curation prototype in your institution.
2. Identification of areas to invest in locally to build knowledge and skills to meet the needs of a digital repository program.
3. Review existing digital repository characteristics that best illustrate roads to success.
4. Access to resources, guides, models, and best practices relevant to the digital curation and repository landscape.
5. Identifying and establishing relationships within your organization to achieve a digital archives repository program.

The workshop focuses on reiterating the core principles of three (3) basic archival theories and practices as delineated in the SAA Code of Ethics, specifically, a) authenticity and integrity – archivists strive to preserve and protect the authenticity of records in the holdings by documenting their creation and use in hard copy and electronic formats; b) access – archivists strive to promote open and equitable access to their collections; and c) security – archivists protect all documentary materials for which they are responsible. Although each category of the Code of Ethics could be highlighted as a part of the workshop focus, time restraints prevent that much compression. It could, however, be part of the marketing strategy for selling the importance of a digital curation program.

In addition, the workshop participants are required to learn and understand the core requirements for digital archives, which delineate eight basic structural guidelines for success. These requirements include:

1. Ensuring integrity, authenticity and usability of digital objects
2. Operating within an efficient and effective policy framework
3. Acquiring and maintaining contractual, legal, historical, fiscal, and organizational rights
4. Committing to maintenance of digital objects
5. Maintaining the repository permanently with sufficient resources (author’s emphasis)
6. Acquiring and ingesting digital objects based on stated criteria and policies
7. Creating and maintaining requisite metadata about digital objects during preservation, production, access and usage processes
8. Fulfilling dissemination requirements

4.4 Student Expectations

Prior to offering each workshop, registered attendees are asked to identify their learning objectives. These summaries are shared with the instructor in anticipation of allowing the instructor to address them with the workshop participants as well as help define the scope of the instruction. The expectations for Digital Curation: Creating an Environment for Success has, to date, fallen into four learning categories:

1. Practical strategies for engaging stakeholders
2. Identify resources for best practices including terminology standards
3. Methods for providing access to born-digital content
4. Better understanding of ways to establish a repository program

Interestingly, both in the course of offering the workshops and in the assessments, it has become clear that scale is an issue. Solutions that work for large universities may not be applicable for smaller local historical societies. One of the foci for software developers and vendors should be to address these scale concerns for all phases of the born-digital lifecycle from ingest through management to access and preservation. What is the best way to offer services, tools, and applications for both state and local governments when staffing, budgets, and institutional support differ significantly? Scale can be an issue during instruction as well. The resources, especially staff, available to address digital curation issues definitely affect opportunities for success.

Several workshop attendees expected the workshop to be “extremely useful to help in strategic planning for preservation of my centre’s digital resources.” These expectations expose a basic issue within the entire DAS program, that is, the professional confusion between concepts such as digital curation, digital preservation, electronic records management and digital repository development. This confusion requires that the instructor spend a portion of every workshop clarifying terms, concepts, and delineating the scope of the particular workshop across the spectrum of digital archival activities. While this confusion may be attributable to the current state of archival training and expectations, this author believes it is a significant issue across institutions as well since the concepts and their definitions change across professions and professional associations. Clarifying the language of the project and/or program at a specific institution is significant communication hurdle for practitioners as well as workshop instructors. Stabilizing vocabulary is a first, and critical, step in team building success. Communication fails if language variations are not address in advance.

Another major stepping stone is revealed in expectations from participants that include specific learning goals such as “advantages/disadvantages of using scanners vs. digital cameras for image capture” or “evaluations of digital asset management systems.” While this particular workshop does discuss and identify specific software and their vendors, at no time does the workshop go into the type of operational details that these participants seem to desire. Rather than understanding the language to have a vendor...
conversation, these participants clearly want specific guidance for day-to-day operational specifications. There are DAS courses that offer this kind of detail, this workshop does not.

4.5 Specific Group Activities

The workshop opens with an icebreaker activity that requires the participants to find attendees who fit specific categories. Titled *Have you ever?* the questionnaire asks about living overseas, singing karaoke, eaten frog legs, seen a polar bear, etc. There are twenty categories and several of the activities are written in such a way as to require clear communication skills. For example, *have you ever flown a plane?* The question does not ask, “have you ever flown in a plane?” The difference between the two questions is extensive. Every single workshop taught to date has misread that question which opens up a huge avenue for discussion about language meaning and understanding.

The activity lasts 7-10 minutes. During the review period, two lessons are discussed: 1) if word constructs, such as the one above concerning the airplane, are so important, how would that skill translate in team building for digital curation? 2) How many attendees, colleagues, participants share traits, activities, interests that are new to you? Sharing these newly discovered traits expands the communication paths, both professionally and personally.

A second activity involves breaking entire group into smaller cohorts of four-to-six participants. The smaller groups are given the opportunity to identify seven items necessary to survive on an island. The type of island, the length of time on the island, and available resources are not specified. Participants have to prioritize and strategize to survive. Certain tools and skill sets are necessary while others are “luxuries” when survival is the goal. This activity is translated from an island environment to establishing priorities for digital survival. It requires the participants to create strategic plans for their digital curation development, maintenance and permanence. Interestingly, certain characteristics always rise to the top of the survival list: staffing, equipment, expertise and funding. These characteristics are not surprising or unexpected. They are, however, brought to the forefront of the participant to allow them to begin identifying strategies for acquiring necessary tools.

Other activities utilized during the workshop to engage participants are geared toward developing a working outline for use when attendees return to their individual workplaces. For example, depending on time, participants will develop a marketing, promotional campaign. This author’s favourite to date compared digital curation to fruit preservation via canning. The visual comparisons and the use of food as a motivator are strikingly affective. There are no individual activities or tasks. Since the workshop is focused on team building, group activities are required.

4.6 Student Evaluations

After the workshop has been completed, participants are asked to assess the course “from the standpoint of what you gained from the experience.” The participants are also asked to rate the “methods and materials relative to their value in accomplishing the course.” In addition, they are asked to rate the instructor, identify the most valuable methods and materials, identify aspects of the course that should be changed, and provide any additional comments.

4.6.1 Question 1

In the question relative to assessing the course for experience gained, there are eight segments:
To date, the participants have valued the balance in the workshop between technical born-digital materials management and team building as they relate to real-world experiences. Generally, the highest scoring questions have been components of team building with a 4.68 out of 5 and pinpointing areas to invest in locally to build knowledge and skills with an average of 4.47 out of 5.

The lowest scoring question in this section has been new skills acquired with an average 4.09 out of 5 and likelihood of applying concepts to your work with an average 4.19 out of 5. These scores are alarming in that archival professionals are taking (and paying for) professional development that they readily report may not be able to apply in their daily jobs. The survey does allow participants to discuss specific operational hurdles. These hurdles are revealed during group discussions but they usually require one-on-one solutions local to the institution.

4.6.2 Question 2

The question asking participants to rate methods and materials specifically asks for feedback on clarity of handouts, content of handouts, exercise/group discussions, clarity of visual aids and content of visual aids. The highest scoring questions in this group has been exercises/group discussion with a 4.45 out 5 score and clarity of visual aids at 4.41 out of 5. These scores are clearly concrete recommendations for instructors relative to the needs of the workshop participants to interact with one another and visually see examples of content as it is being discussed. Workshops must be vibrant and relatable to real-world scenarios to work with digital curation practitioners.

The lowest scoring question in this group has been clarity of participant handouts with a 4.27 out of 5 and content of participant handouts at 4.31 out of 5. These responses are a tad confusing when compared with the open-ended comments in questions four through six which often include complaints about the size and density of PowerPoint slides. Workshop participants either do not value the handouts during the workshop due to their preference for group discussions or expect handouts to serve as a post-workshop tool in which case the clarity and content is evaluated in its reflection at a later date. Additional study is required to understand the respondent’s answers. It might be possible for SAA to restructure the question to provide the workshop instructor with more detailed information and guidance.

4.6.3 Questions 3

The third set of questions in the assessment asks for participants to rate the instructor on knowledge of topic, preparation, ability to handle questions, and presentation skills. Fortunately for the workshop instructor/author, these scores have been consistent at 4.91 out of 5. One of the most positive aspects of both these questions and comments in questions four through six has been the participant’s emphasis on appreciation of the instructor’s positive attitude, especially “in light of the enormity of the topic.”
### 4.6.4 SUMMARY OF ASSESSMENT RESPONSES

#### Question One: Assess the course from the standpoint of what you gained from the experience

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<th>Session 2</th>
<th>Session 3</th>
<th>Session 4</th>
<th>Session 5</th>
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<td>Access to resources, guides, best practices</td>
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<td>4.63</td>
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<td>Recognize and establish relationships</td>
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<td>New knowledge skills acquired</td>
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<td>4.06</td>
<td>3.91</td>
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<td>Likelihood of applying concepts</td>
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<td>4.17</td>
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<td>Expectations met</td>
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<td><strong>Overall Score</strong></td>
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<td><strong>4.48</strong></td>
<td><strong>4.48</strong></td>
<td><strong>4.27</strong></td>
<td><strong>4.5</strong></td>
<td><strong>4.41</strong></td>
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#### Question Two: Rate the methods and materials relative to their value in accomplishing the course.

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<td>Clarity of participant handouts</td>
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<td>Content of participant handouts</td>
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<td>Clarity of Audio-visual aids</td>
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<td>4.78</td>
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<td><strong>4.44</strong></td>
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#### Question Three: Rate Individual Instructor

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<td>Knowledge of topic</td>
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<td>4.91</td>
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<td>Preparation</td>
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<td>4.94</td>
<td>5</td>
<td>4.81</td>
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<tr>
<td>Ability to Handle Questions</td>
<td>4.77</td>
<td>4.97</td>
<td>4.94</td>
<td>5</td>
<td>4.95</td>
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<td>Presentation Skills</td>
<td>4.74</td>
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<td>4.94</td>
<td>4.91</td>
<td>5</td>
<td>4.9</td>
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<tr>
<td><strong>Overall Score</strong></td>
<td><strong>4.77</strong></td>
<td><strong>4.95</strong></td>
<td><strong>4.95</strong></td>
<td><strong>4.95</strong></td>
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### 4.6.5 Questions 4-6

The last three questions on the assessment are open-end, participants can comment on any aspects of the workshop in a narrative format, which in many ways is the most valuable feedback for the instructor. One of the participants summed it very nicely, “stepping back to see the big picture mission and strategy for digital curation and encouraging us here to build teams with our archival colleagues.” The most consistent positive comments fall into specific areas:

- Small group exercises and discussions are widely valued
- Participants appreciate practical tools, real-life examples and best practices
- Focus on developing realistic strategic and action plans is appreciated
• Exercises to develop critical thinking on the topic should be mandatory
• Policy outlines, discussions and strategies for repository management
• Gaining a general overview of digital curation and repository processes is critical

Eric M. Kimura attended to Ventura, CA workshop and summarized his experience, “very comprehensive picture of digital curation management.” Another attendee summarized the workshop goals quite well, “knowing the steps for getting started with digital curation was invaluable.” While archival and information technology professionals will admit that the digital curation conversation has been going on for quite a few years, the reality is that most institutions are addressing the problem in fits and starts. Foundational workshops that identify the key issues and address the communication needs across departmental boundaries are critical at this juncture.

Among the segments of the workshop that participants would change are those areas that, unfortunately, cover the most technical areas of the born-digital life cycle management such as understanding the OAIS model and the digital curation lifecycle. The other prominent emphasis for change extends to the need to collaborate in areas that force participants to extend themselves outside their comfort zone to interact with professionals from other fields such as information technology. Conclusion: team building is hard; digital curation is complicated; success requires standing up to both challenges, facing them head on, and moving forward at each juncture.

5. Lessons Learned

Erica Bondreau, JFK Library Digital Archivist and DAS student blogger, commented after attending the Boston workshop, “this course represented a return to the concerns surrounding born-digital material.” The overriding metaphor for the workshop is the oft utilized “you can’t eat an elephant whole.” Large, complex programs, such as digital curation, need to be broken down into manageable pieces to achieve successful outcomes. Bondreau extended that metaphor in her blog, “an elephant, once broken apart, is best eaten with friends.” She is correct, digital curation “cannot be managed by one archivist alone. Partnering is key to your success.”

The major lesson learned in conducting these workshops has been the overwhelming value of real-world processes, best practices and examples. Each workshop allows group discussions around topical concerns. In every case, one or two major projects currently being undertaken became the focal point for practice. Whether it be the large data set curation efforts at Purdue, digital programming at WGBH in Boston, state government records in Sacramento, local property records in Lancaster, or genealogical family records in Provo, the issue revolves around a central core – how can I make this work at my institution? Often without new resources, staff or funding, these professionals are hungry for real world, affordable solutions. The workshop goals are designed to address those issues specifically.

The other lessons have been technical: are eight hours too long? Too short? Are PowerPoint’s too text-rich? Not enough? Can small repositories learn from larger ones and vice versa? These issues can be addressed on-site during a specific workshop and with a specific set of participants. The value of the pre-attendance questionnaires is immeasurable when considering these issues.
6. Planning for the Future

There are two adjustments made to every workshop in advance of its offering: 1) Update available tools and 2) Reevaluate best practice examples. It is incumbent on the workshop instructor to stay current. The digital curation landscape changes every day. Since its core is technology, the options are constantly in flux. It is imperative upon the instructor to adjust the take-aways from the workshop so that they are as up-to-date as possible. It is also critical for the instructor to always focus on core competencies. Tyler Walter delineated these in his 2011 Association of Research Libraries report entitled New Roles for New Times. He stated, “collaborative or community-based approaches to digital curation are likely to be more effective and sustainable…when following these recommendations:

- Stop waiting and start proactive engagement locally
- Stake a claim in the production cycle
- Start retraining and repurposing staff
- Be a doer, not a broker, wherever possible
- Consider digital curation collaborations
- Actualize collaborative engagement

Archival professionals understand the necessity to host digital content and curate the core components of their work. What they require from the Society of American Archivists and other professional associations is educational guidance in the form of workshops, tutorials, publications, and solid advice. Digital curation is too complex and expensive to experiment and fail miserably. Therefore, many professionals expect assistance that will help them succeed and subsequently save our digital heritage.

Notes

1. Comments noted in this section have been extracted from SAA workshop evaluation summaries. Workshops, during 2012 have been held on the following dates in the detailed archival regions:
   - Boston, MA, January (31 respondents)
   - Ventura, CA, April (29 respondents)
   - Provo, UT, June (16 respondents)
   - University Park, PA, June (11 respondents)
   - West Lafayette, IN, July (21 respondents)

   Total number of surveys reviewed: 108

   Additional workshops have been scheduled for New Orleans, LA (October), Austin, TX (December), and Philadelphia, PA (January 2013). It will be interesting to see if the response trends shift.
References


Special Issue on Special Collections and Archives in the Digital Age. Research Library Issues: A Quarterly Report, RLI 279, June 2012.


**Tools**

- Archivematica: [http://archivematica.org](http://archivematica.org)
- BitCurator Tool: [http://www.bitcurator.net](http://www.bitcurator.net)
- Forensic Toolkit Imager: [http://accessdata.com/support/adownloads](http://accessdata.com/support/adownloads)
- HTTrack (local website copying app): [http://www.httrack.com](http://www.httrack.com)