New York Heritage (NYH) Digital Collections
Planning Your First Project

We ask institutions to contribute to New York Heritage through a series of small projects that have concrete deadlines and measurable goals. For each project, select an entire collection or a batch of related objects for digitization instead of adding a series of unconnected items to New York Heritage. Before beginning your first project, use this checklist to make sure you also have the necessary resources available:

- Who will do the conversion from physical object to digital image? Staff? Volunteers? Interns? Will you outsource this task?
- What equipment is needed? Will purchasing new equipment be necessary?
- Where will the conversion be done? Do you have a secure and comfortable place to work?
- Is the collection already described? If the items you are considering have little or no description, then metadata creation will take substantially longer.

If you do not have enough staff hours or appropriate scanning equipment to complete the project you have in mind, consider embarking on a smaller project, seeking out a grant, or discussing your plans with your regional library council.

Selecting Materials for New York Heritage

What type of projects should you do? Think about your institution's vision and goals. Are there collections that you own that relate to this vision? For instance, if you work for an education institution, what do you have that you can digitize to assist students and scholars? More questions to think about:

- What materials warrant increased access? Most contributions to New York Heritage will be public and will point researchers back to your institution.
- Which items are popular? Do you receive repeated requests to copy materials from certain collections? Consider digitizing them for your users.
- What is difficult to access? Are there materials that are in a format that's currently hard to access (example: wax cylinder)? Are there fragile materials that you currently public deny access to because of its condition?
- Which materials are of value? Do you own unique materials that are not available anywhere else? What about materials not currently available online?
- New York Heritage would like to highlight items of regional interest. If you are unsure about where to begin, check out our New York Heritage Topics List.
- Finally, consider copyright issues. Is the item in the public domain (i.e. before 1923)? Will posting the item online invade the privacy of a person living today (e.g. educational or medical records)? Can the item be considered an original work of art or literature? If so, will posting the artwork online deprive the author or artist of income?

If your collection is less than thirty items, you may want to consider outsourcing the project, especially if you don't have the staff trained in digitization already and you don't plan to contribute any additional collections. If your collection contains less than thirty items you also may not want to join New York Heritage as most regional library councils require that you become a dues paying affiliate member in order to receive the necessary training to participate.

If you have selected a large collection to digitize, it is recommended that you digitize a sample of approximately 5 to 25 digital objects to determine the amount of time that it takes to digitize items and the workflow for your organization. We also recommend that you begin with a format that is straightforward, like postcards or photographs. You may then consider adding additional collections over a period of time.

Copyright and/or ownership issues to be aware of:

Whenever possible, the holding institution or repository provides all known information about copyright owners and other restrictions in the information, or metadata, associated with digital items. The holding institution provides this information to assist users in determining the copyright status of an item. New York Heritage also provides a general copyright information statement on its website for users.

The nature of historical, archival and manuscript collections often make it difficult to determine the exact copyright status of an item. There are many issues related to copyright. See the New York Heritage training page for a list of resources that can help you to determine the copyright status of the materials in your collections.

Your Organization's Responsibilities

Contributing organizations are responsible for:

- ***Creating the digital files (e.g., scanning or transferring audio or video clips to a digital file, etc.)***
  You can create the digital images at your organization, you might be able to borrow a scanner from your library council, and some library councils offer digitization equipment for use at the council. Another option for creating digital files is to outsource the work to a digital imaging vendor. These vendors can only create some of the technical metadata associated with the newly digitized image.

- ***Creating the descriptive information about the object (i.e. the metadata)***
  Select a person who is knowledgeable about your collection to create the descriptive metadata. They will be trained by your regional library council on how to create the metadata and how to adhere to the New York Heritage metadata style guidelines. You may already have information about the original resource in some other location like a library online catalog or an archive automated system like the PastPerfect museum software. This information may be a starting place to build your metadata records for your collection. Whether you have information already in hand or you are describing items for the first time, you can use CONTENTdm™ to create your Dublin Core metadata records. If you have data in a format that can be exported into a tab-delimited file (such as from PastPerfect), you can import that file into CONTENTdm™. If you do not have a file, then you can create your records using the CONTENTdm™'s Project Client. It provides templates and other tools that allow you to create consistent metadata. Just as you can import data into CONTENTdm, you can also export your full Dublin Core records. You can export them as a tab-delimited file or as an XML file.

- ***Uploading the digital files and metadata to the New York Heritage server***
  The last step in the process is to approve and upload your records to the New York Heritage server. Typically this final step is preformed by the New York Heritage project manager for your organization.

Questions to Ask Before Starting a Digitization Project

1) What is your purpose?
There are many reasons for digitizing collections. Some of the first questions you should ask are:
- For what purpose do you want to use the digitized materials and what are the benefits of having this collection in digital form? Is there a demand for the content of these materials in digital form?
- What are the goals of your project/what do you hope to accomplish?
- Is the main goal increased access or decreased handling of fragile originals (preservation)? Or both?
- Will the digital images replace or supplement existing originals?
- Will the digitized materials complement existing collections in online or print form, or might they fill a lack of digitized materials in a certain unique subject or topical area?

2) Who is your audience?
Another important question to ask at the outset of any digitization project is:
- Who is your intended audience? This will determine the parameters of the project at all stages of digitization.
- Often your audience can be divided into primary (in your service area), secondary (related to your service area), and tertiary (Internet users at large) user groups.
- What are the needs of your users and how can you best serve them? This question may apply to modes of access, what search features and web interfaces will be most helpful to your users, what types of browsing might be appropriate, how users intend to use the information, scanning practices appropriate to intended use of the materials, etc.
- Will your audience be local or global? Will access be restricted or password protected?

3) What are the physical characteristics of the collection?
- What is the physical condition of the materials? How do the originals need to be handled during scanning to prevent further deterioration?
- What is the format of the collection (negatives, black and white, color, text and graphics, etc.)?
- What size are the materials? Do you have the capability to scan oversize materials?
- What is the quality of the originals? This will determine what resolution you will scan at (scan at the highest resolution appropriate to the quality of the object you are scanning is a general rule of thumb), as well as file size and storage considerations.

4) Who owns it?
Copyright is important and it is essential to understand issues of ownership and intellectual property rights.
- Who owns the materials?
- Are they in the public domain? If not, can permissions be secured?

5) What is your timeframe?
This is an important consideration, especially for grant-funded projects. As a rule, everything usually takes longer than you plan for. It is helpful to break the project schedule down into proposed durations, with milestones and expected completion dates.

6) How is the project being funded?
- Have you secured a funding source for this project?
- Have you considered local, state, national, philanthropic, and collaborative sources?
- What parts of the project will funding support? (Physical resources, hardware, software, networked access, personnel, dedicated space, vendor services, etc.)
- What about plans for maintaining access into the future (ongoing costs)? Is there a long-term institutional commitment to this project?

7) How will you perform the actual digitization?
- Where will the digitizing take place--in a central location or off-site? If off-site, does the vendor have adequate, safe storage facilities?
- What is the level of image quality (resolution) you hope to obtain (according to user needs and the quality of originals you are digitizing)?
- What is your criteria for an "acceptable image" when performing quality control?
- How will you store copies of the digitized images? CD-ROM, magnetic tape?
- Are there specific image guidelines specified by your funding source that you must adhere to?
- Will you create an "archival image" as well as derivative files for viewing and downloading?
- What are the limitations of your hardware and software (file size, file format standards, proprietary file formats, interoperability, scanner limitations, etc.)?

8) What metadata scheme are you planning to use?
- What type of description already exists for the collection, and at what level (item level, collection level...)?
- What metadata or finding aid scheme do you plan to use (Dublin Core, MARC, VRA, EAD, etc.)?
- If there are several versions of an original, which version will you catalog?

9) How are you planning to maintain the collection into the future?
- How do you plan to store archival images and where?
- What kind of a backup mechanism do you have in place in case of hardware/software failure?
- What plans have you considered for data migration and refreshment?
- What level of long-term institutional commitment have you secured for your project?
- Do you have funding resources secured for maintenance of the digitized collection into the future?